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Alde-Ore Local Economic Study

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The views and propositions expressed herein are, unless otherwise stated, those of Risk & Policy Analysts and do not necessarily represent any official view of 'The Alde & Ore Association' or any other organisation mentioned in this report.

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1 Executive Summary

This study aims to provide a ‘snapshot’ of the economic benefits of the Alde-Ore estuary and local environment as it is now in order to better understand who benefits from flood protection and, therefore, highlight who has an interest in ensuring continued maintenance and/or improvement of the defences.

In order to understand the flow of resources both into and out of the Alde-Ore local area economy, we developed a set of questionnaires focusing on respondent’s average spend within the Alde-Ore local area as well as their usage of the local area and what they value. The questionnaires were designed, as far as possible, to be comparable with results from the previous study carried out in 2004. Residents and visitors, yachting and sailing club members, wildfowlers, businesses and reserves within the Alde-Ore local area were surveyed via online and paper questionnaires, and through face-to-face interviews during the period July to November. We received a total of 559 questionnaire responses. A brief overview of the analysis of the various user groups’ questionnaire responses follows.

1.1.1 Main findings from the questionnaires

Residents

The top three reasons for living in the Alde-Ore local area given by respondents were: the attractive environment/scenery; its location near the beach/coast; and the peace and tranquillity of the area. The overall total spend per person by residents was £2,057 per year. Food and drink was the category which had the highest level of spending (£1,089 per person per year), followed by travel costs (£398 per person per year) and club membership fees (£209 per person per year). All items of expenditure had increased in comparison to the previous study, except for a decrease in spending on gifts and souvenirs (55% decrease), with the highest increase on food and drink and admission fees (211% and 88% increase respectively). The most frequently undertaken activities by residents were the same as for the previous study: shopping; walking; and beach visits.

Visitors

Visitors to the Alde-Ore local area were willing to travel an average of 126 km to visit the Alde-Ore local area, with the main reason for visiting being the scenery/landscape. A large proportion of respondents indicated that they are repeat visitors to the Alde-Ore local area (67%), with 30% indicating that they visit the area more than 4 times per year. Average spend per adult per year was £354. The highest proportion of visitor expenditure is attributed to accommodation (£132 per adult per night), followed by food and drink (£104 per adult per year), and boating and sailing (£33 per adult per year). Comparing current visitor expenditure with that for visitors in 2004, the largest increase in expenditure was on admission fees into attractions (150% increase) and travel expenses (135% increase). The most popular activities undertaken by visitors were: walking (8 times per person per year); visiting the beach (7 times per person per year), sightseeing, and shopping (both 6 times per person per year).

Overall scenery, tranquillity, countryside, beauty and peace were the most popular words given by residents and visitors regarding what they value most about the Alde-Ore local area.

Yachting and sailing club members

Respondents spend an average of 40 days per year sailing within the Alde-Ore local area, mainly taking part in dinghy sailing (69%) and yachting (53%) as opposed to activities on the open sea. The most popular answers given for what respondents saw as advantages for sailing in the Alde-Ore local area were: an attractive environment (96%); and the facilities offered by sailing clubs and safe waters (both 76%). Respondents spent an average of £1,611 per household per year on sailing related activities. In contrast, expenditure in the previous 2004 study was higher at £1,975 per household per year (in 2013 prices). In the current study, food and drink accounted for the highest proportion of expenditure (£338 per household per year), followed by vessel maintenance (£273 per household per year) and moorings (£225 per household per year). High levels of expenditure for vessel maintenance were recorded in 2004 at £440 per household per year, and expenditure was also higher for exceptional vessel repairs (£214 compared with £104 per household per year in the current study). On the other hand, expenditure on fuel was higher in the present study (£108 compared to £75 per household per year in 2004). Results from this study revealed differences in the expenditure patterns between clubs, with members of Aldeburgh Yacht Club spending more on average than members of Slaughden and Orford Sailing Clubs (Aldeburgh Yacht Club = £2,606; Slaughden Sailing Club = £1,088; Orford Sailing Club = £1,437 per person per year).

Wildfowling

Of the 30 respondents who undertake wildfowling activities inside the Alde-Ore local area, the majority came from outside the local area (60%). Respondents spend an average of 16 days per year taking part in wildfowling activities in the Alde-Ore local area. The average spend by respondents within the Alde-Ore local area, whilst undertaking wildfowling activities, was £1,079 per person per year.

Businesses

In comparison with the business spreadsheet compiled from the from the Alde & Ore Future project, there was a good representation of a number of business types from the responses received. However, a relatively small proportion of the total estimated businesses within the Alde-Ore local area responded to the survey (3% of approx. 1,000 businesses).

The respondent businesses provide a total of 518 jobs, with 202 full-time jobs and an average of 5.8 full-time employees. Their average gross annual turnover falls within the '£500,000 to £1 million' category, although the highest percentage of businesses fell within the 'over £1 million' category (equivalent to 29% of responses). Over half of respondents indicated that the quality of the local environment was essential to their business (54%), and 86% of business respondents said that their business would be affected should river activities in the Alde-Ore local area no longer be possible and thus result in a decline in visitor numbers. Beach visits (39%), walking (36%), shopping (36%), concert going (34%) and sailing (32%) were the activities considered to contribute the most to business within the Alde-Ore local area. However this may be due to the fact that businesses which rely on the environment for a significant proportion of their income were more likely to respond to the questionnaire.

Reserves

A total of five reserves within the Alde-Ore local area completed questionnaires. The quality of the local natural environment was indicated to be either very important or essential to attracting visitors to the sites. Visitor numbers are not recorded at most of the reserves, however it is estimated that the five sites receive a combined total of 11,150 visitors annually, with the majority of visitors

received during April to September (65%). The turnover at each site varies and is dependent upon a range of factors. Most of the turnover is generated through entrance fees, grants (such as agri-environment schemes) and charity donations. Gross annual turnover at the 5 sites ranged between <£100,000 and £500,000. Staff levels vary considerably between each site, which may be in part due to reserve size and visitor numbers. The average number of full time staff is 1.2 persons per year with a total of 6 staff across the five reserves. The total number of paid and volunteer staff for the five reserves is 15.8.

Though reserve management would likely adapt to any changes in estuary management, some of the reserves also rely upon the local infrastructure which is protected by the flood defences to aid physical management and public access i.e. roads and pathways.

1.1.2 Other research findings

Farming

Agriculture in the Alde-Ore area contributes significantly to the local economy, and indeed to the UK as a whole, with the light, free draining soils and favourable climate ensuring high productivity (NFU, 2010).

Farming within the Alde-Ore local area contributes around £9 to £12 million in agricultural output alone to the local economy, with an estimated area of 3,000ha of agricultural land. The main crops are root vegetables and forage maize, which are heavily reliant on freshwater. Up to 40% of the water used for irrigation in the East Suffolk area is susceptible to saline ingress, should the sea defences fail. It is suggested that the value of agricultural land, within the Alde-Ore local area, would decline by an estimated £4,000 per ha from the current estimated value of around £13,000 to £14,000 should irrigation no longer be possible (Peter Youngs pers. Comm., 2013).

As well as agricultural output and land value, farming within the Alde-ore local area also supports other industries such as haulage companies, machinery dealers and agricultural contractors, as well as other stakeholders further down the supply chain including supermarkets and consumers. Farms within the Suffolk coastal area, which encompasses the Alde-Ore local area, supported an estimated 2,200 jobs in 2008 (NFU, 2010). Agriculture in the Suffolk coastal area also provides tourism and biodiversity benefits constituting 66% of the land area in coastal Suffolk (NFU, 2010).

1.1.3 Overall economic benefits

The overall economic value of the Alde-Ore estuary and local environment to the Alde-Ore local area economy can be estimated by using information on local area demographics and visitor numbers together with the outputs from the questionnaires on local spending. In order to calculate the overall local and tourist spending contribution to the Alde-Ore local area economy, a number of assumptions have been made (details of which can be found in the main report).

Based on the total number of residential properties (7,585) and second homes (964) within the Alde-Ore local area the estimated total spend by home and second homeowners is £16 million and £1.6 million per year respectively. The estimated total visitor spend within the Alde-Ore local area by day and overnight visitors is £59 million and £17 million per year respectively, based on 280,000 day visitors per year (estimated as a proportion of the number of day visitors to the Suffolk Coast and Heaths Area of Outstanding Natural Beauty from URS, 2013) and 99,000 overnight visitors per year (estimated as a proportion of the number of overnight visitors to the Suffolk Coastal District from Visit England, 2011). A further £1.4 million per year is generated by yachting and sailing, and around £65,000 per year by wildfowling.

This gives a total annual spend of £96 million within the Alde-Ore local area by residents, visitors and recreational users.

Agriculture is also an important land use within the estuary that relies on freshwater being available for irrigation. The current value of agricultural output alone to the local economy is estimated at £9-£12 million per year within the Alde-Ore local area (based on information from the East Suffolk Water Abstractions Group). Businesses in the Alde-Ore local area also play an important role in the local area economy supporting a large number of jobs, many of which rely on the revenue generated from tourism and recreation. Many of these businesses will benefit from some of the £96 million spent in the area each year¹; others will benefit from agricultural production in the area. However, it is important to recognise that detailed, area specific analysis of supply chain benefits and the associated value of employment have not been carried out as part of this study, though the value of these is likely to be significant.

The estuary and the environment of the Alde-Ore local area play a significant role in the reasons why residents choose to live in the area and in attracting visitors and recreational users to the area. Businesses also stated that the environment played an important role in sustaining their business, though it must be recognised that this is based on a small sample size (37 businesses) with a high probability of self-selection.

The economic impacts of changes to the management of flood defences may be significant. However, this study does not attempt to place a value on the impacts this would have to the local economy. As such, conclusions on the magnitude of changes to the local economy from changes to flood defences cannot be made. It does highlight that there are a number of activities which rely on the estuary and the local environment, with residents, visitors and local businesses valuing the landscape characteristics and opportunities they provide.

¹ This must be taken with caution given that the small number of business responses (37) makes it difficult to assess whether the perceived environmental benefits are representative of all businesses in the Alde-Ore local area, or a reflection of those that were more likely to respond to the questionnaire.

2 Introduction

2.1 Background

The Alde and Ore Association is a member of the Alde and Ore Estuary Partnership, which has representatives from all the interests involved in the Estuary, including the Environment Agency. Currently the partnership is working with the Environment Agency and their consultants to consider how flood defences can continue to be provided to protect the local economy. Many of the flood compartments were shown, in the Environment Agency's assessment, to have low benefit-cost ratios and as a result national funding is likely to be limited. Defra's policy of partnership funding provides an opportunity for those who benefit from the flood defences to help contribute towards the costs of ensuring that flood protection can continue to be provided.

A baseline economic study of the Alde-Ore area was carried out by of the University of Wales in 2004 for the Friends of the Rivers Alde & Ore (Edwards & Thomas, 2004). This study aimed to establish the economic significance of the recreational and commercial uses of the Alde-Ore Estuary in order to inform planning and decision-making. The study provided an inventory of the contribution by businesses to the local economy and the relationships between the environment and the economy.

The Alde & Ore Association is now seeking to update the 2004 study to better understand who benefits from flood protection and, therefore, who has a vested interest in ensuring the continuation of the defences. The Alde-Ore area is a honeypot destination attracting many visitors to the area either as day trippers or overnight visitors, predominantly during the peak season. In addition, there is particularly high demand for second homes within the Alde-Ore area for use as holiday homes or retirement destinations. The natural environment is a key attribute in the popularity of the Alde-Ore area and many sectors of the local economy are linked to the environment. The 2004 study showed that key sectors in the local economy include: sailing and boating, angling, wildfowling, walking and bird watching. Key attractions in the area are utilised by both residents and visitors and include the sailing facilities, historical markets towns, the Snape Maltings complex, several nature reserves and internationally designated habitats. All of the attractions contribute to the local economy in some way through direct/indirect spending and employment.

This economic assessment aims to capture these sectors and their contributions to the local economy and relationship with the natural environment.

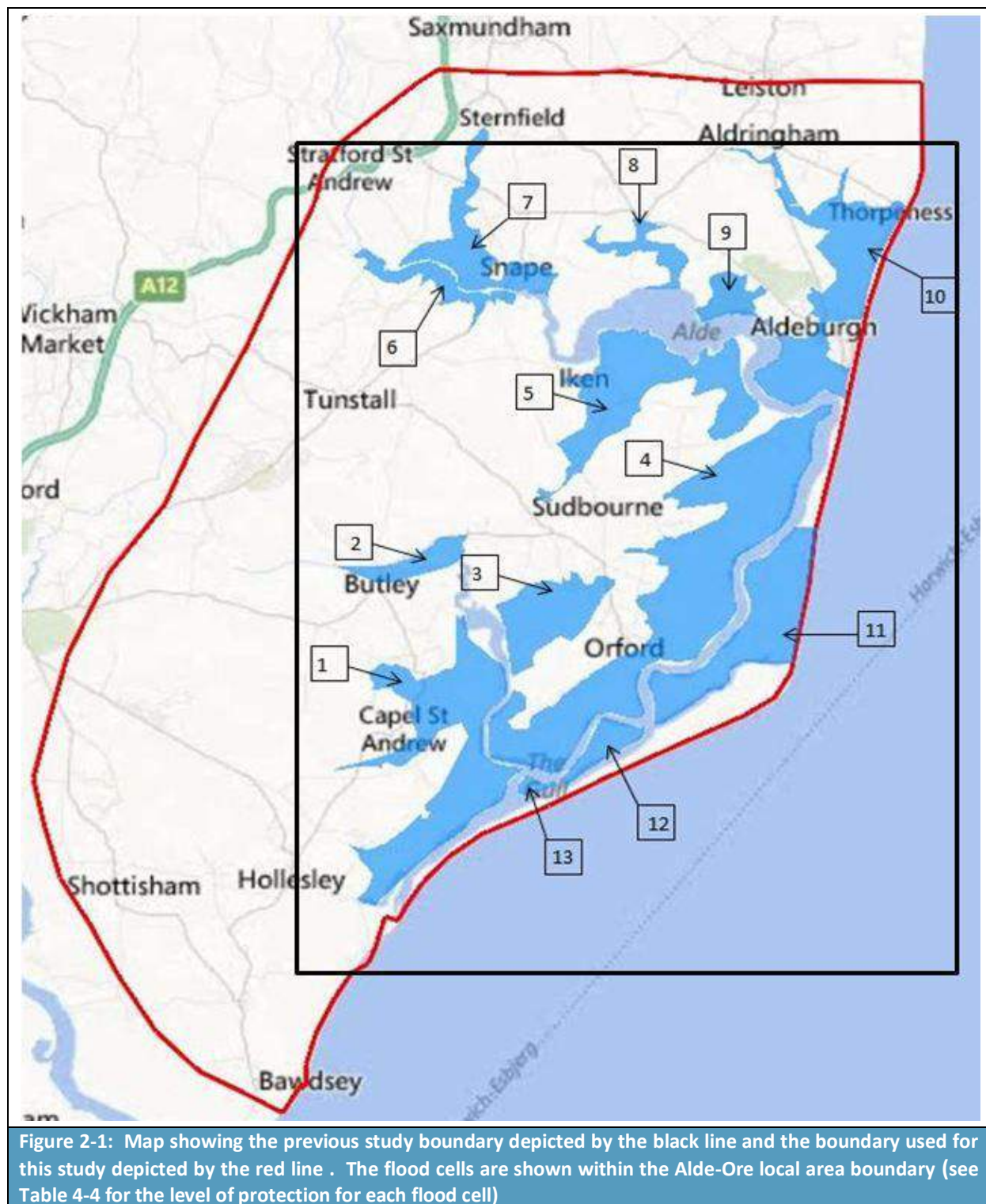
2.2 Objectives

The overall objective of the study is to update the 2004 study on how the local economy benefits from flood protection, by providing a 'snapshot' of the economic benefits of the estuary/environment as it is now.

2.3 Study Area

The Alde-Ore study focus area was established in consultation with the Alde & Ore Association and was used to define the study area (Figure 2-1). The area encompasses the flood cells FC1 to FC13

and includes the following wards: Aldeburgh; Snape; Orford & Tunstall; Hollesley with Eyke; and approximately 50% of Sutton, Rendlesham and Leiston. The flood cells are currently protected by flood defences at different standards of protection (see Table 4-4 for the level of protection for each flood cell).



3 Study Methodology

3.1 Study boundary

The study area boundary was selected in consultation with the Alde & Ore Association, and is based on that used for the previous study together with information on the flood cell boundaries. However, the study area is slightly larger than the previous study, and this should be recognised in any comparisons between the outputs from the current study and the 2004 findings.

3.2 Development of questionnaires

Questionnaires were developed in consultation with the Alde & Ore Association and based on the format of those used in the previous study. The format of the questionnaires was adapted slightly to make them more concise, but still allow for comparison of the key outputs with the results of the 2004 study. Separate questionnaires were developed for the following user groups:

- Householders and visitors
- Yachting and sailing clubs
- Wildfowlers
- Businesses
- Reserves

Questionnaires were made available in the following formats to capture a range of user preferences:

- Online questionnaires via SurveyMonkey²;
- Paper questionnaires; and
- Paper questionnaires completed via one-to-one consultation.

A copy of the questionnaires used in the study can be found in Annex 1.

3.3 Distribution of questionnaires

Questionnaire distribution, promotion, face-to-face interviews and collection was conducted by volunteers of the Alde & Ore Association between the end of July and mid-November 2013. Paper questionnaires were deposited in a range of locations throughout the Alde-Ore local area. In key locations, questionnaires were placed alongside a distinctive red collection box which displayed the aim of the study and QR codes; if scanned, these codes would allow the participant to complete the questionnaire online through a smart device (such as smartphone or tablet). Further smaller bundles of questionnaires were placed at several other locations together with a poster inviting the participant to fill in the questionnaire. The questionnaires could be filled out and returned in two ways:

- to any of the collection boxes (a list of primary collection points were listed within the questionnaire and on the Alde & Ore Association website); or

² SurveyMonkey website: <https://www.surveymonkey.com/>

- by post to the Alde & Ore Association.

Table 3-1 shows the number of distribution and collection points within the Alde-Ore local area throughout the duration of the surveying period.

Table 3-1: Number of distribution and collection points within the Alde-Ore local area				
Distribution/Collection	Snape	Orford	Aldeburgh	Other
Distribution point	4	6	5	12
Collection point	1	2	5	-

In addition to the distribution points, paper questionnaires were also distributed via post by the Alde & Ore Association to various groups within the Alde-Ore local area. These groups included:

- Members who could not be contacted via email. This was done so as to minimise bias towards electronic completion within the Alde & Ore Association members' participation;
- Alde-Ore residents and businesses (through ad hoc intermittent delivery); and
- Aldeburgh and Orford Sailing Clubs (through bulk delivery of questionnaires) to;

Face to face interviews were carried out by volunteers usually working in teams of two at Orford, Snape and Aldeburgh during the course of the collection period. Members of the public would be randomly approached and asked if they would be happy to partake in the survey. If so, the volunteers would read out each question and record the participant's response on a paper questionnaire. Table 3-2 shows the number of participants at each location.

Table 3-2: Number of responses from face to face interviews within the Alde-Ore local area			
Date	Snape	Orford	Aldeburgh
09/08/2013	-	-	17
16/08/2013	11	-	-
17/08/2013	13	-	-
30/08/2013	-	-	14
01/09/2013	-	-	3
07/09/2013	-	7	-

The questionnaires were also distributed electronically to Alde & Ore Association members, local businesses, nature associations (such as the wildlife trust and national trust), Alde and Ore Wildfowlers Association and Aldeburgh Yacht Club members.

3.4 Dissemination of information about the study

A range of media was used to advertise the study and generate interest and uptake. The launch of the survey was advertised in a range of local newspapers and magazines. In addition, the study and questionnaire were promoted through articles in regional newspapers and an interview on Radio Suffolk. The Alde & Ore Association website was also used to promote the study. A brief description of the study was given followed by information regarding the collection points and links to the questionnaire on Survey Monkey.

3.5 Additional data collection

Secondary and primary data was collected in addition to the data gained from the questionnaires. The Alde & Ore Association undertook phone interviews or email correspondence with representatives from several organisations, including:

- The Aldeburgh Yachting club;
- Suffolk Wildlife trust;
- The National Trust;
- The RSBP; and
- Local businesses owners

RPA contacted Peter Youngs from the East Suffolk Water Abstractors Group to gain information on current water abstraction and farming practices within the Alde-Ore local area. Additional information on tourism within area was gained through correspondence with several attractions including the Suffolk Punch Trust and the Aldeburgh Food Festival.

Secondary data was gained from data sources including statistics holding websites (Office for National Statistics), maps (Ordnance Survey) and other media (online reports, published materials, grey literature etc.).

4 Local area demographics

The total population size of the Alde-Ore local area is estimated at 15,820 residents in 2011 (Table 4-1). This figure is an increase from the total population size recorded in 2001 (6% increase), with most wards showing increases, and the wards of Aldeburgh; Snape; and Orford & Tunstall showing population declines. Of particular note is Rendlesham, which has shown the highest population increase (706), and Aldeburgh, with the highest decrease (313).

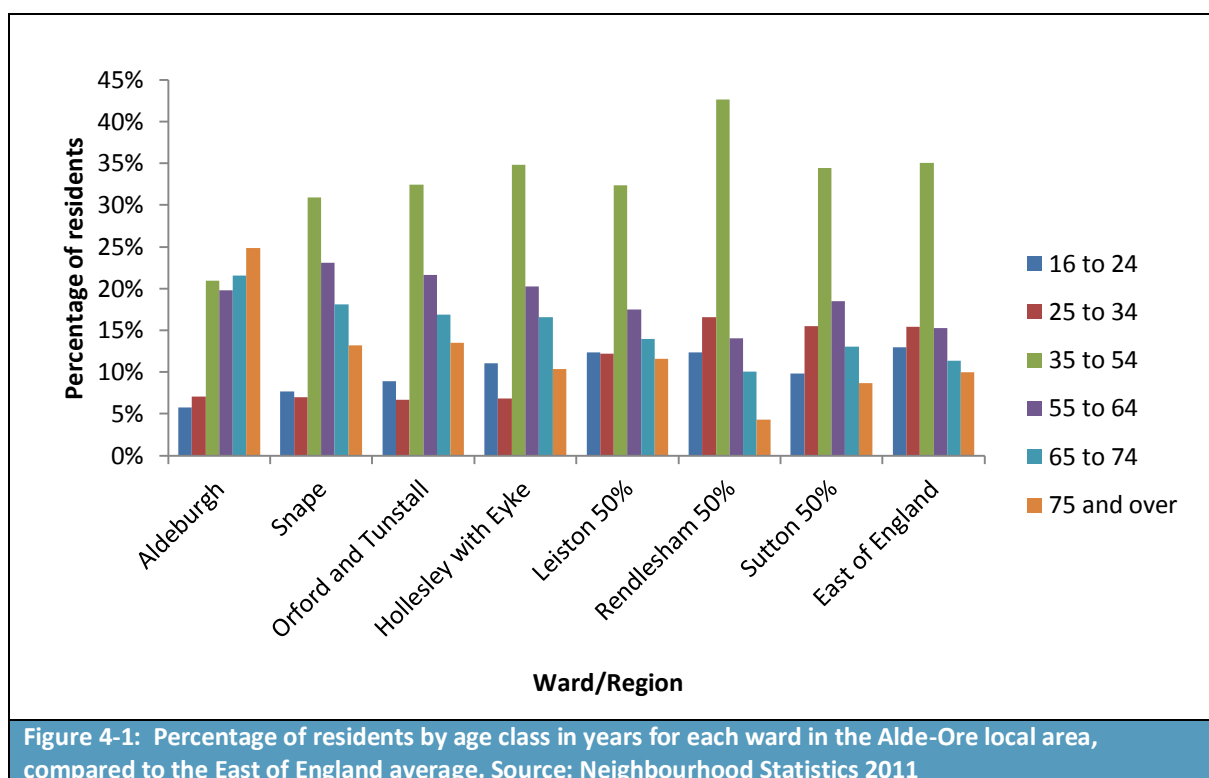
Table 4-1: Alde-Ore local area population size by Ward. Source: Neighbourhood Statistics ³ 2001 and 2011 census			
Ward	2001	2011	Change 2001-2011
Aldeburgh	3,538	3,225	-9%
Snape	1,914	1,911	-0.1%
Orford & Tunstall	1,855	1,830	-1%
Hollesley with Eyke	2,314	2,473	+7%
Sutton (50%)	1,206	1,507	+25%
Rendlesham (50%)	988	1,694	+71%
Leiston (50%)	3,120	3,180	+2%
Total	14,935	15,820	+6%
Note that figures for the wards of Sutton, Rendlesham and Leiston are presented as 50% of actual figures to take account of them not fully being within the Alde-Ore study area.			

The age structure of the Alde-Ore local area has slightly more residents within the older age ranges (55 to 75+ yrs) when compared to the East of England average than the lower age ranges (16 to 54 yrs) (Table 4-2). The overall average age of residents within the Alde-Ore local area is 52.

Table 4-2: Alde-Ore local area population age structure compared to the East of England. Source: Neighbourhood Statistics 2011 census		
Age class	Percentage of residents	
	Alde-Ore local area	East of England
16-24	9%	13%
23-34	10%	15%
35-54	31%	35%
55-64	19%	15%
65-74	16%	11%
74 and over	14%	10%

Aldeburgh, in particular, has markedly more residents over the age of 75 than any other age class while Rendlesham has more residents between the ages of 35 to 54 than the East of England average. The percentage of residents within each age range by Ward and for the East of England is shown in Figure 4-1.

³ Neighbourhood Statistics website: <http://www.neighbourhood.statistics.gov.uk/dissemination/>



The total number of residential properties in the Alde-Ore local area was 8,549 in 2011 (Table 4-3). A relatively high number of second homes were recorded in Aldeburgh with lower numbers in Snape and Orford & Tunstall, though recent figures are not available for most Wards. The total number of residential households can be calculated by subtracting second homes (964) from all dwellings, giving 7,585 properties (using the most recent figures for second homes).

Table 4-3: Number of residential properties and second homes in the Alde-Ore local area. Source: Neighbourhood Statistics			
Ward	All Dwellings (2011)	Second residence/ holiday accommodation (2001)*	Second Homes (Dwellings) (2008)
Aldeburgh	2,639	545	685
Snape	1,037	84	88
Orford & Tunstall	1,124	167	191
Hollesley with Eyke	960	37	N/A
Sutton (50%)	617	31	N/A
Rendlesham (50%)	687	5	N/A
Leiston (50%)	1,485	26	41
Total	8,549	859	964
*Second residence/holiday accommodation is based on vacant accommodation for unoccupied household spaces. People undertaking the census were not asked to differentiate between second homes and holiday homes so they cannot be distinguished in output.			

The number of residential properties at risk of flooding was 1009⁴ (Halcrow, 2011). Table 4-4 shows the number of properties within each flood cell and the standard of protection provided by each flood cell. In 2009 the Alde & Ore Association and the Environment Agency jointly commissioned a survey of property values within areas in the Alde and Ore Estuary at some risk of flooding, either within the flood cells or from the open coast⁵. The total value was estimated at approximately £524m, including around £10m attributed to properties that had not been professionally valued. The figures, at 2009 prices, should be treated with caution and are included here only as an indication of the insurable value of properties within the study area.

Table 4-4: Number of residential properties at risk of flooding within flood cells located within the Alde-Ore local area				
Flood Cell and location name	Standard of protection (Year 0) ¹	Estimated residual life of defences ¹	No. of residential properties	
			Below lowest crest level ²	At or above crest level ²
FC1 Boyton and Butley Marshes	1:5 (<20%)	<5 years	3	10
FC2 Butley Mills	1:1 (<100%)	<2 years	2	28
FC3 Chillesford Lodge Marshes	1:20 (<5%)	<10 years	1	27
FC4 Orford with Gedgrave and Sudbourne Marshes	1:5 (<20%)	<2 years	39	66
FC5 Iken Marshes	1:5 (<20%)	<2 years	16	16
FC6 Snape to Langham Bridge South	<1:1 (100%)	<2 years	6	12
FC7 Snape to Langham Bridge North	<1:1 (100%)	<2 years	7	65
FC8 Ham Creek Marshes	1:1 (<100%)	<5 years	0	1
FC9 Hazelwood Marshes	1:1 (<100%)	<5 years	4	3
FC10s Aldeburgh and Haven Marshes	1:10 (<10%)	<5 years	55	199
FC10n Aldeburgh and Haven Marshes	Not specified		219	230
FC11 King’s and Lantern Marshes	1:1 (<100%)	<2 years	0	0
FC12 Havergate Island	<1:1 (100%)	<5 years	0	0
FC13 Dovey’s Island	1:1 (<100%)	<5 years	0	0
Aldeburgh Sea Defence to Sudbourne Beach ³	1:300 (<0.33%)	Not specified	359 residential properties 165 non-residential properties	
Sources:				
¹ Alde & Ore Futures & Environment Agency (2011): Alde and Ore Futures – Managing the Coast, Appendix A-Technical Appraisal Report, Final for Consultation, 23 June 2011. Note: standard of protection shown assumes no active intervention scenario. ² Alde & Ore Futures & Environment Agency (2011): Alde and Ore Futures – Managing the Coast, Appendix B-Economic Appraisal Report, Final for Consultation, 30 June 2011. ³ Alde & Ore Futures (nd): Managing the Coastal Environment. publication document.				

Table 4-5 shows the number of assets located within the flood cells and the Alde-Ore local area as a whole.

⁴ Post consultation work after the publication of the Alde & Ore Future study, has led to this estimate increasing to 1550 homes below the 5m contour. Further details and analysis will be made available in the AOEP strategy which is currently in press (Alde & Ore Association, pers. Comm.)

⁵ Alde & Ore Association and Environment Agency unpublished survey, details available on request.

Table 4-5: Number of other assets within the flood cells* and the Alde-Ore local area

Category	Asset	Number in flood cells	Total in Alde-Ore local area
Emergency Services ¹	Fire Station	1	2
	Police Station	1	2
Social infrastructure ^{1,2}	Hospital	0	1
	Place of Worship	5	36
	Library	0	1
	Post Office	0	5
	Sports ground	1	4
	Payphone	1	21
	Education facility	1	11
Utility services ^{1,3}	Masts	12	17
	Pumping house	2	2
	Lighthouse	0	1
	Windmill	0	2
	Electricity sub-station	14	14
	Electricity switchgear	20	2
	Wind generator	1	4
	Sewage pumping station	3	3
	Sewage works	1	8
Recreation and tourism ^{1,4}	Parking	4	18
	Jetty	2	1
	Museum	0	2
	Information/Visitor centre	3	3
	Parks and gardens	0	2
	Pub	2	16
	Picnic site	0	7
	Other tourist attraction	3	3
	Camping and caravan sites	2	9
	Boat trips/ferry	0	5
	Public toilets	1	2
Heritage ⁴	Listed buildings	60	302
	Scheduled ancient monument	3	29
Railway ^{1,5}	East Suffolk line Lowestoft to Ipswich	0.4km	7km
Roads ¹	B roads	5km	62km
	A roads	0.6km	18km
Power lines ¹	Double lines from Sizewell to Bramford	2km	29km
	Electricity pylons	10	82
Public paths ¹	Long distance trail, Suffolk Coast & Sandlings Walk	16km	78km

*Note that the standards of protection differ between flood cells (see Table 4-4)

Sources: ¹ Ordnance Survey (2014) OS getamap

(<http://www.getamap.ordnancesurveyleisure.co.uk/>); ² Ordnance Survey (2013) OS Vector Map District [download]

(<http://www.ordnancesurvey.co.uk/business-and-government/products/vectormap-district.html>); ³ Alde and Ore Futures (2011): Alde & Ore Futures – Managing the Coast. Appendix B – Economic Appraisal Report.;

⁴ English Heritage (2014) The National Heritage List for England - Map Search

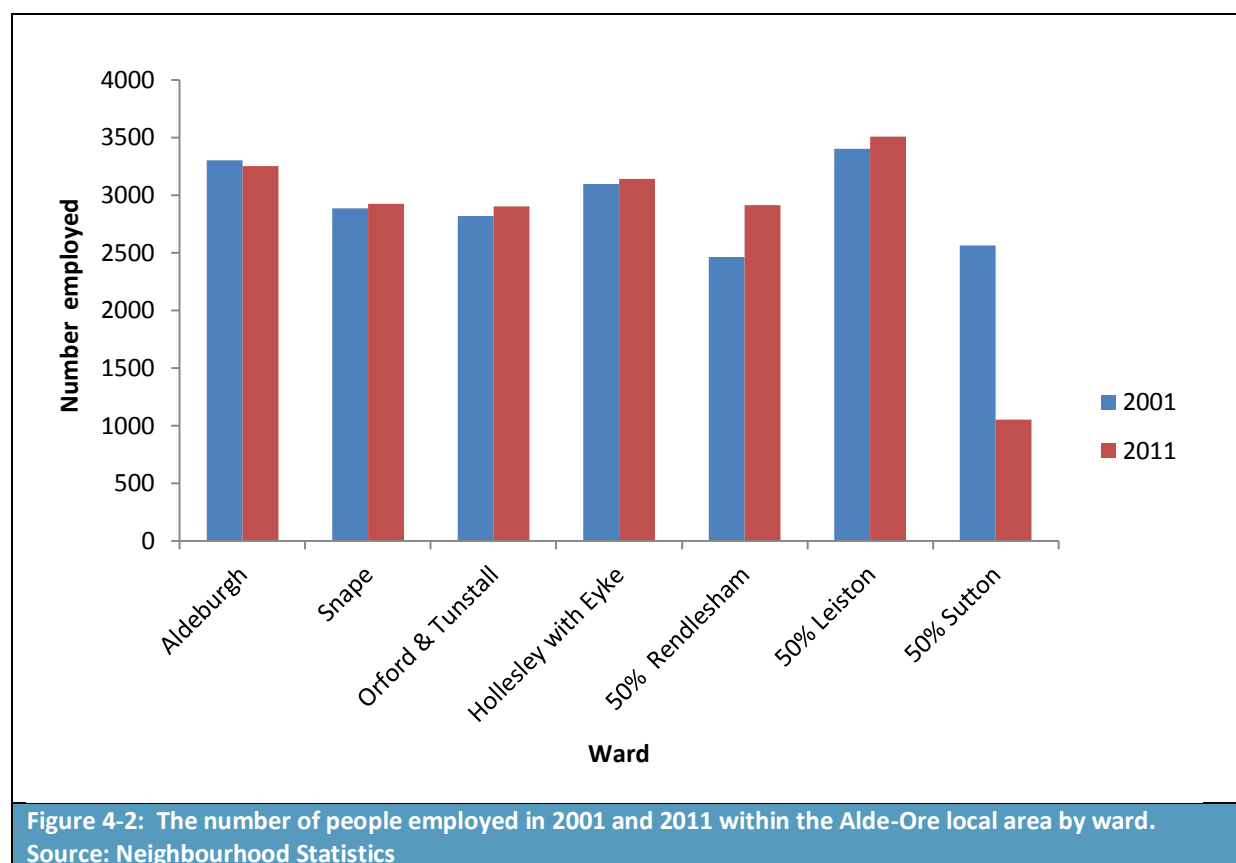
(<http://list.english-heritage.org.uk/mapsearch.aspx>); ⁵ National Rail (2014) Maps of the National Rail network (http://www.nationalrail.co.uk/stations_destinations/maps.aspx)

Employment within the Alde-Ore local area in public administration and defence increased by 73% (Table 4-6), while agriculture, forestry and fishing declined along with other services such as mining and quarrying and manufacturing (29%, 21% and 34% respectively). This could in part be explained by changes in job type classification, for example, the farming industry has changed to rely more on contracting out certain services, leading to these jobs now falling under a different category. This may also explain why employment within real estate has fallen by 81%, which may be due to these positions being listed under different categories (such as administration and support services). Overall the number of people employed within the area fell by 4% between 2001 and 2011, which may be an impact of the recession. In fact much of the fall in employment occurred in Sutton, declining by 59%, with most wards seeing a slight increase in employment levels, apart from Aldeburgh declining by 1.5% (see Fig 4-2).

Table 4-6: Number of people aged 16-74 employed in the Alde-Ore local area by employment type in 2001 and 2011. Source: Neighbourhood Statistics

Employment sector	2001	2011	Percentage change between 2001 and 2011
Agriculture; forestry and fishing	433.5	307.5	-29%
Mining and quarrying	9.5	7.5	-21%
Manufacturing	661	438.5	-34%
Electricity; gas and water supply	211.5	281.5	+33%
Construction	536	619	+16%
Wholesale and retail trade; repair of motor vehicles and motor cycles	971.5	992.5	+2%
Transport and storage	436.5	295.5	-32%
Accommodation and food services	545.5	558	+2%
Information and communication	-	274.5	-
Financial and insurance activities	131.5	164.5	+25%
Real estate activities	667.5	124	-81%
Professional, Scientific and Technical Activities	-	389	-
Administration and support service activities	-	354.5	-
Public administration and defence; compulsory social security	447	771.5	+73%
Education	417	611	+47%
Health and social work	623	808	+30%
Other	438.5	414	-6%
Total	20,536.5	19,688	-4%

Notes: The Alde-Ore local area includes the Wards: Aldeburgh, Snape, Orford & Tunstall, Hollesley with Eyke, and 50% of the following: Rendlesham, Leiston, Sutton.
The categories for some employment types differed between 2001 and 2011, and where possible figures have been merged in order for comparison, however, some categories could not be matched between years and have been left blank.



5 Results

5.1 Key assumptions

Responses were compiled using SurveyMonkey to facilitate the analysis; with paper questionnaire responses being entered into SurveyMonkey by the Alde & Ore Association (all questionnaires entered from paper versions were given a code to enable traceability). A total of 559 questionnaire responses were received (Table 5-1).

Table 5-1: Response rate to the different types of questionnaires	
Questionnaire	Number of Responses
Householders/Visitors	355
Yachting and Sailing Clubs	131
Wildfowlers	34
Businesses	37
Reserves	3 (but cover several reserves)
Total Responses	559

In all of the cases, where respondents left an answer blank, we assumed this to indicate zero, unless otherwise stated. For example, for a question regarding the amount spent on a particular item, a blank response was taken to mean that they did not spend anything on this item. This approach is likely to underestimate the final values but was used as a cautionary approach rather than risking an overestimation.

Several questions in the questionnaires provided ranges to make it easier for respondents to fill in the answers (for example, High = 61-100%; Med = 30-60%; Low = 0-29%). In order to calculate averages the mid-point of these ranges was used. This is likely to have led to underestimated values on questions where an open ended category was provided, for example where the highest range was + or 'and above'.

For the home and second homeowner's questionnaire, questions relating to direct expenditure did not include items such as household maintenance. This is for two reasons: (i) to focus on the recreational activities to enable the analysis of the economic benefits of recreational opportunities in the assessment and (ii) to ensure that the results were as comparable as possible to the previous study. Thus the assessment does not cover any of the indirect effects associated with the potential changes in maintenance spending, were there to be changes to the estuary.

Comparisons between this study and the previous study conducted in 2004 are presented where possible. However, the exact assumptions used in the previous study were not always clear, so an element of caution is needed. The study areas are also slightly different, with the current study area being larger than the former; this should also be considered when making conclusions regarding any comparisons between the two studies. Values in £2004 prices were converted to £2013 prices using Consumer Price Indices⁶.

Several questions included an 'other' category, where for example respondents could indicate additional items of expenditure. Due to the range of responses received, it was not always possible

⁶ Office of National Statistics website: <http://www.ons.gov.uk/ons/datasets-and-tables/data-selector.html?cdid=D7BT&dataset=mm23&table-id=1.1>

to include these answers within the analysis, especially where a unit was not indicated (e.g. expenditure per week/year). Also some of the answers given were re-iterations of what was already indicated in the given list of options, thus to avoid double counting the majority of 'other' responses have not been included in the main analysis but are referred to in the text where appropriate, with full lists of responses included in the Annexes.

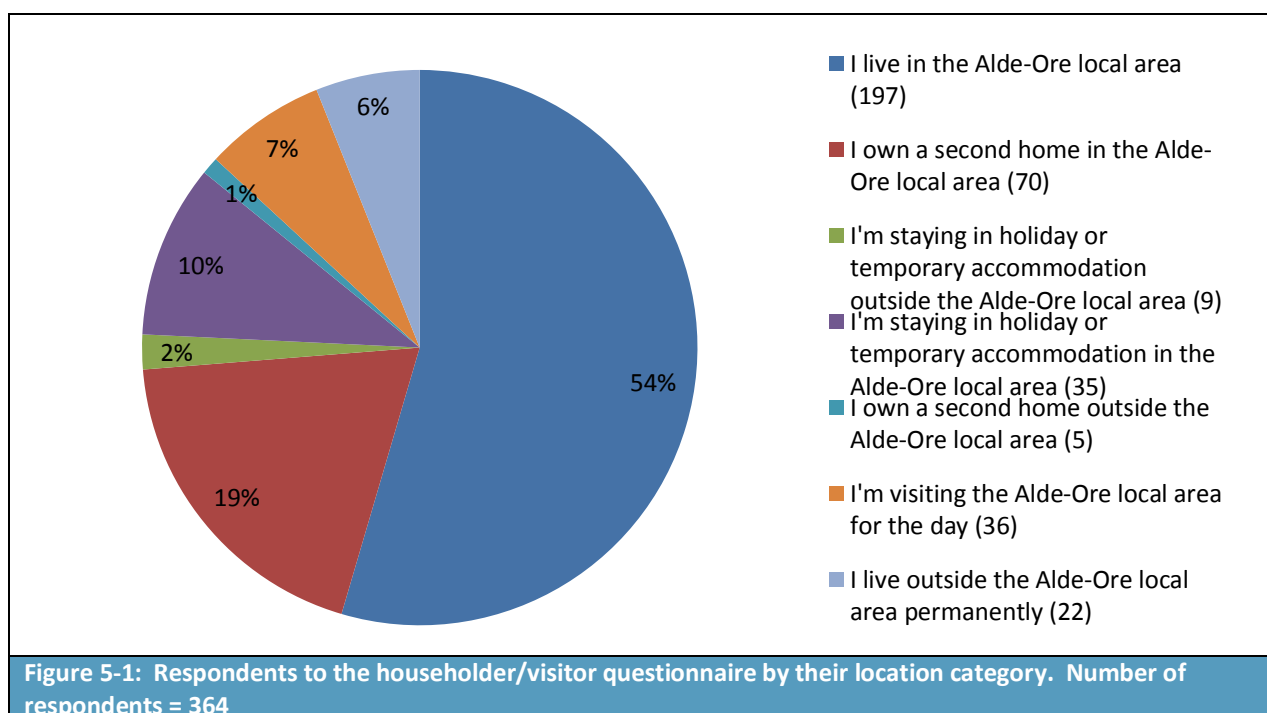
5.2 Householders and Visitors Questionnaire

Questionnaires included an initial question which allocated respondents to various categories. Respondents were initially asked to choose which one of the following best represented their current situation:

- Alde-Ore local area resident;
- Second homeowners in the Alde-Ore local area;
- Staying in temporary holiday accommodation in the Alde-Ore local area;
- Visiting the Alde-Ore local area for the day;
- Resident outside of the Alde-Ore local area;
- Own a second home outside of the Alde-Ore local area; and
- Staying in holiday accommodation outside the Alde-Ore local area.

Their choice of category affected the type of questions which they were subsequently asked. These categories were then grouped into two main types of respondent: Householders (including second homeowners) in the Alde-Ore local area and visitors to the Alde-Ore local area (all remaining categories).

Figure 5-1 shows the number of respondents by their location/situation category. A total of 364 responses to the questionnaire were received.



5.2.1 Homeowners/Second homeowners in the Alde-Ore local area

The results below display the combined totals for homeowners and second homeowners in the Alde-Ore local area where possible. In addition, where appropriate, comparisons between the two have been made. Annex 2 presents the full analyses for householders and second homeowners. In some cases it was not possible to fully determine the assumptions used in the previous study's analysis, thus any comparisons made are cautionary.

The majority of respondents' homes were located in Aldeburgh (49%) and Orford (18%) (See table 5-2).

Table 5-2: Location of homeowners and second homeowners in the Alde-Ore local area (figures rounded to whole numbers)		
Factor	Number of respondents (ranked)	Percentage of individuals
Aldeburgh	113	49%
Orford	42	18%
Other	26	11%
Iken	9	4%
Sudbourne	9	4%
Aldringham Cum Thorpe	7	3%
Snape	5	2%
Blaxhall	4	2%
Tunstall	2	1%
Farnham	3	1%
Friston	2	1%
Chillesford	2	1%
Gedgrave	1	0.4%
Benhall	1	0.4%
Butley	1	0.4%
Capel St Andrew	1	0.4%
Sternfield	1	0.4%
Total number of respondents	229	

The top four reasons for living in the area given by homeowners were: attractive environment/scenery (62%); near the beach/coast (56%); peace and tranquillity (45%); and moved here after retiring (41%) (Table 5-3). Respondents listed 'other' reasons for living in the Alde-Ore local area (see Annex 2 for complete list): sailing/river amenities (8 responses), being born in the area (2 responses) and location amenities (4 responses). The top three reasons for choosing to live in the area are the same as those given by residents from the previous 2004 study (124 respondents).

Table 5-3: Factors influencing homeowners' decision to live in the Alde-Ore local area, and comparison with results from the 2004 study (note that some questions were not included in the previous study)			
Factor	Number of respondents agreeing that this was a factor that influenced their decision (ranked)	Percentage of individuals	Percentage of individuals from 2004 survey
Attractive environment/scenery	105	62%	60%
Near the beach/coast	96	56%	58%
Peace and tranquillity	77	45%	58%
Moved here after retiring	70	41%	38%
Music/art	69	41%	41%
Activities in the area	68	40%	44%
Family links	66	39%	49%
Changed second home into permanent home	49	29%	-
Previously lived in the area	35	21%	-
Interest in wildlife/bird watching	36	21%	-
Always lived in the area	23	14%	26%
Near workplace/former workplace/education	23	14%	21%
Good shopping facilities	19	11%	10%
Good schools	5	3%	13%
Investment in property	5	3%	-
Other	28	16%	0%
Number of respondents	170		124

The top four reasons for having a second home in the area given by respondents were: attractive environment/scenery (79%); near the beach/coast (79%); peace and tranquillity (68%); activities in the area (63%) (Table 5-4) (56 respondents). The previous study found that, of the 26 second homeowners who responded, peace and tranquillity (82%); attractive environment/scenery (71%) and near coast/beaches (68%) were the top three reasons for having a second home in the area. Again, therefore, there is consistency between the two studies.

Table 5-4: Factors influencing second homeowners' decision to have a second home in the Alde-Ore local area, including comparison with the 2004 study results, note that some questions were not included in the previous study			
Factor	Number of respondents agreeing that this was a factor that influenced their decision (ranked)	Percentage of individuals	Percentage of individuals from 2004 study
Attractive environment/scenery	44	79%	71%
Near the beach/coast	44	79%	68%
Peace and tranquillity	38	68%	82%
Activities in the area	35	63%	46%
Music/art	28	50%	33%
Family links	24	43%	62%
Other	15	27%	48%
Interest in wildlife/bird watching	13	23%	24%
Good shopping facilities	9	16%	0%
Previously lived in the area	7	13%	29%
Investment in property	7	13%	9%
Always lived in or near the area	4	7%	0%
Purchased house here after retiring	2	4%	-
Near workplace/former workplace/education	1	2%	-
Number of respondents	56		26

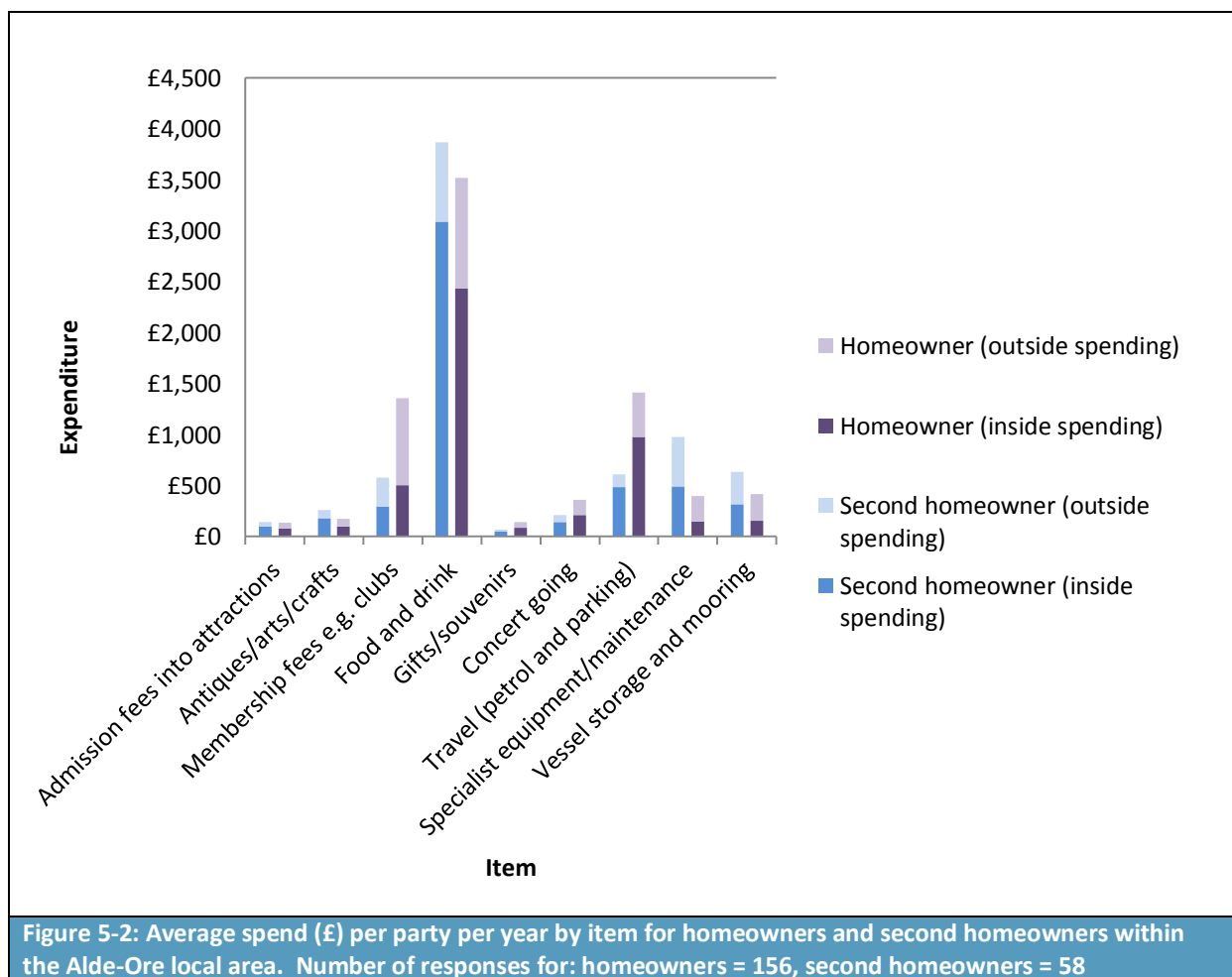
In terms of estimated local spend, householders typically do most of their shopping for daily essentials such as food, fuel for heating etc. within the Alde-Ore local area (69%), with second homeowners doing nearly all their shopping for daily essentials within the area (80%). Respondents indicated that moderate to large non-essential items are sourced outside the local area with 63% of items bought outside the area. Second homeowners indicated that they buy over half of their moderate to large items from within the local area (50%). Over half of small, non-essential items are sought from within the Alde-Ore local area by both home and second home owners (58% and 69% respectively) (see Annex 2 for full results).

In terms of local average spend, the overall total average spend by homeowners within the Alde-Ore local area was £4,677 per household per year (156 responses), compared to £5,136 per party per year (58 responses) for second homeowners (based on an average stay of 12 weeks per year⁷), with a combined total average annual spend of £4,802 per party per year (214 responses). As expected the highest amount of expenditure was on food and drink (£2,433 homeowners; £3,085 second homeowners per party per year), with travel costs including parking being the second highest expenditure for homeowners (£976 per household/yr) and specialist equipment being the second

⁷ Based on 56 responses.

highest expenditure for second homeowners (£489 per party/yr) (Figure 5-2). This is likely to be an underestimate as the category 'other' has not been included in the analysis due to the uncertainty of some of the figures given. This category included expenditure on: horses, hairdressers, property maintenance, gardening, etc. (see Annex2 for more details).

From the indicated proportion of local spending and the indicated monetary spend by type of item, it is possible to calculate the amount of expenditure flowing outside of the Alde-Ore local area economy. The largest amounts of expenditure on items which are sourced from outside of the Alde-Ore local area include specialist equipment, membership fees and vessel storage (illustrated by the pale bars in Figure 5-2). The amounts contain a slight element of uncertainty due to the categorisation of certain items to small, moderate or large based on the amount spent on those items, and the fact that respondents were not directly asked for the amount spent outside of the area by item.



Most items of expenditure have increased between 2004 and the present study (Table 5-5), however, expenditure on gifts and souvenirs has decreased from £161 per party per year in 2004 (in £2013) to £73 per party per year. The biggest increase is expenditure on food and drink, rising by £1,772 per party per year. Expenditure on travel has also increased markedly, by £356 per party per year.

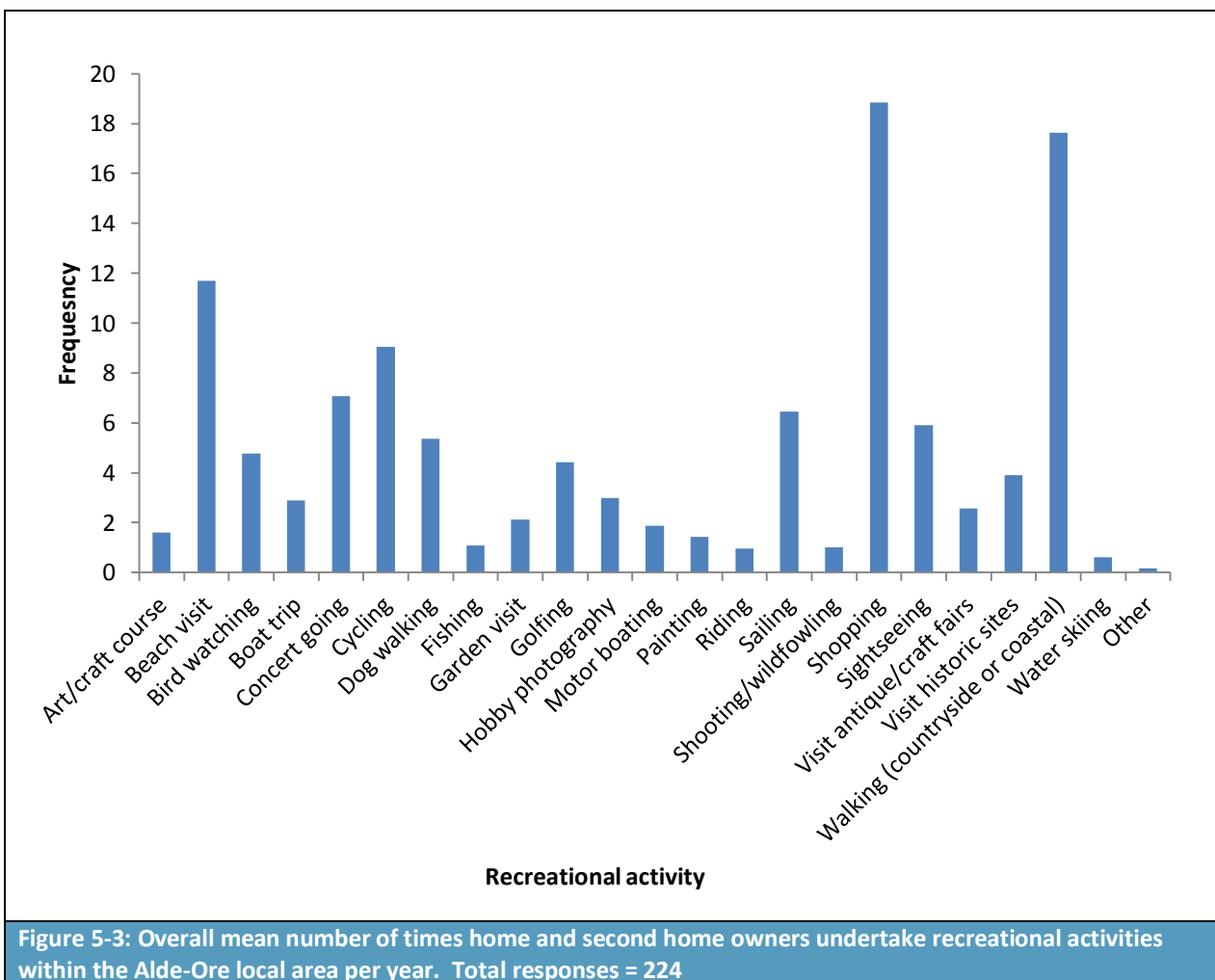
Table 5-5: Mean expenditure per party per year by home and second home owners per item in the Alde-Ore local area compared with results from the 2004 study, showing direction of change			
Item	Mean expenditure per party per year, ranked (N = 214)	Mean expenditure per party per year in 2004 in 2013 prices (N = 120)	Percentage change from 2004 to 2013
Food and drink	£2610	£838	+211%
Travel (petrol and parking)	£844	£488	+73%
Membership fees e.g. clubs	£444	£252	+76%
Specialist equipment/maintenance e.g sailing, boating, art, golf	£240	£237	+1%
Vessel storage and mooring	£198	£135	+46%
Concert going	£199	£160	+24%
Antiques/arts/crafts	£122	£105	+16%
Admission fees into attractions	£81	£43	+88%
Gifts/souvenirs	£73	£161	-55%
Total	£4,802	£2,419	+99%
Note: 2004 prices have been updated to 2013 prices to take account of inflation using CPI values from the Office of National Statistics (http://www.ons.gov.uk/ons/datasets-and-tables/data-selector.html?cdid=D7BT&dataset=mm23&table-id=1.1)			

The overall total spend per person for homeowners and second homeowners was £2,057per year⁸ (Table 5-6).

Table 5-6: Mean expenditure per person per year by home and second home owners per item in the Alde-Ore local area. Number of responses = 214	
Item	Mean expenditure per person per year (ranked)
Food and drink	£1,089
Travel (petrol and parking)	£398
Membership fees e.g. clubs	£209
Concert going	£88
Specialist equipment/maintenance e.g sailing, boating, art, golf	£84
Vessel storage and mooring	£76
Antiques/arts/crafts	£47
Gifts/souvenirs	£35
Admission fees into attractions	£33
Total	£2,057

⁸ Based on an average household size of 1.85 people for homeowners using the average number of people per dwelling (Office for National Statistics) and 5.34 for second homeowners using respondents answer to how many people in their party, plus one to include the person completing the questionnaire.

In terms of activities undertaken within the Alde-Ore area, shopping is undertaken the most by home and second home owners (combined mean number of times per year = 18.8 per person; 224 responses). Walking was the second most popular activity (combined mean = 17.6 times per year) and beach visits the third most frequently undertaken activity (combined mean = 11.7 times per year). Water skiing (combined mean = 0.6 times per year), riding (combined mean = 1 time per year) and shooting/wildfowling (combined mean = 1 time per year) were the least popular activities (Figure 5-3). In the 2004 study the most popular activities for home and second home owners were shopping (78%), walking (59%) and beach visits (50%) more than 24 times (150 respondents). At the other end of the scale, the previous study findings were the same as for this study, with water skiing; shooting/wild fowling; and riding having the highest percentage of respondents indicating that they 'never' undertook these activities.



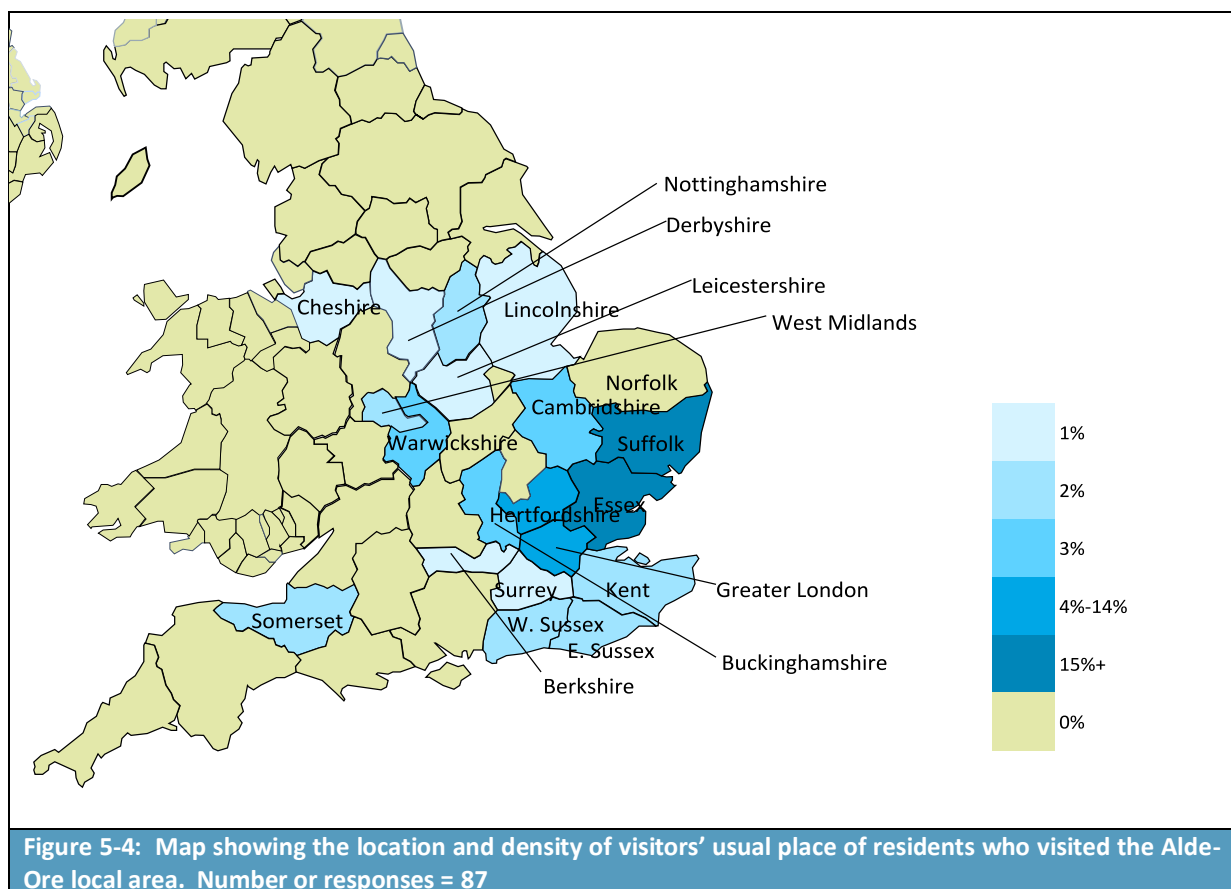
5.2.2 Visitors

Visitors were asked to assign themselves to a group in order for the results to be better interpreted (for example to differentiate between overnight and non-overnight visitors). The results presented here are combined totals across all the types of visitors to the Alde-Ore local area (unless otherwise stated):

- Staying in temporary holiday accommodation in the Alde-Ore local area;
- Visiting the Alde-Ore local area for the day;
- Resident outside of the Alde-Ore local area;
- Own a second home outside of the Alde-Ore local area; and
- Staying in holiday accommodation outside the Alde-Ore local area.

Around 92% of visitors travelled to the Alde-Ore local area by car (45 respondents), with coach travel being the second most popular, but considerably lower, mode of transport (3 respondents). The average time taken to travel to the Alde-Ore local area was 31 minutes (49 respondents).

The majority of visitors to the Alde-Ore local area are usually resident in Suffolk (37%) and Essex (17%). Figure 5-4 shows the relative densities of visitors by County in the UK. The average distance visitors are willing to travel to visit the Alde-Ore local is 126km or approximately 78 miles (N = 87 respondents). Travel distance was calculated by using the most precise location given by respondents (e.g. postcode, part postcode, town, city or county) from usual residency to the centre point of the Alde-Ore local area using Google route planner. The furthest distance a respondent travelled to visit the area was 422km from Somerset.



In terms of repeat visits to the Alde-Ore local area the mean number of times respondents visit within one year was 4 times (calculated using the mid-points for each category). A large proportion of respondents (67%) indicated that they visit the Alde-Ore local area more than once per year with the majority visiting 2-4 times per year (37%), and 16% visiting 5 to 8 times per year (Table 5-7).

Table 5-7: Frequency of repeat visits to the Alde-Ore local area by visitors		
Number of visits per year	Number of respondents	Percentage of individuals
This is a one off trip	22	33%
Not very often (2-4 times)	25	37%
Fairly often (5-8 times)	11	16%
Often (9-12 times)	4	6%
Very often (>12 times)	5	7%
Number of responses	67	100%

The most popular factor given by visitors as influencing their decision to visit the area was the same as that given by home and second homeowners – scenery/landscape (70%) (Table 5-8). Shopping and sightseeing was the second most popular factor attracting visitors, which featured low on the list for home and second homeowners (11% and 16% of respondents respectively compared to 46% for visitors). Snape Maltings was the third most popular factor attracting visitors to the area (38%). ‘Other’ includes a wide range of reasons including Aldeburgh (51%), sailing (6%), food festival (2%), Orford Castle (2%) (Table 5-9)

Table 5-8: Factors influencing visitor’s decision to visit the Alde-Ore local area		
Factor	Number of respondents agreeing that this was a factor that influenced their decision (ranked)	Percentage of individuals
Scenery/landscape	67	70%
Shopping/sightseeing	45	46%
Snape Maltings	38	40%
Beaches	37	39%
Birds/wildlife/nature reserves	30	31%
Friends/relatives	24	25%
Orford town	22	23%
Antiques	14	15%
Sporting event e.g. regatta	11	11%
Business Trip	3	3%
Place of employment/education	3	3%
Other*	49	51%
Number of respondents	96	
*See Table 5-9 for full list		

Table 5-9: Factors influencing visitor's decision to visit the Alde-Ore local area listed under 'other'

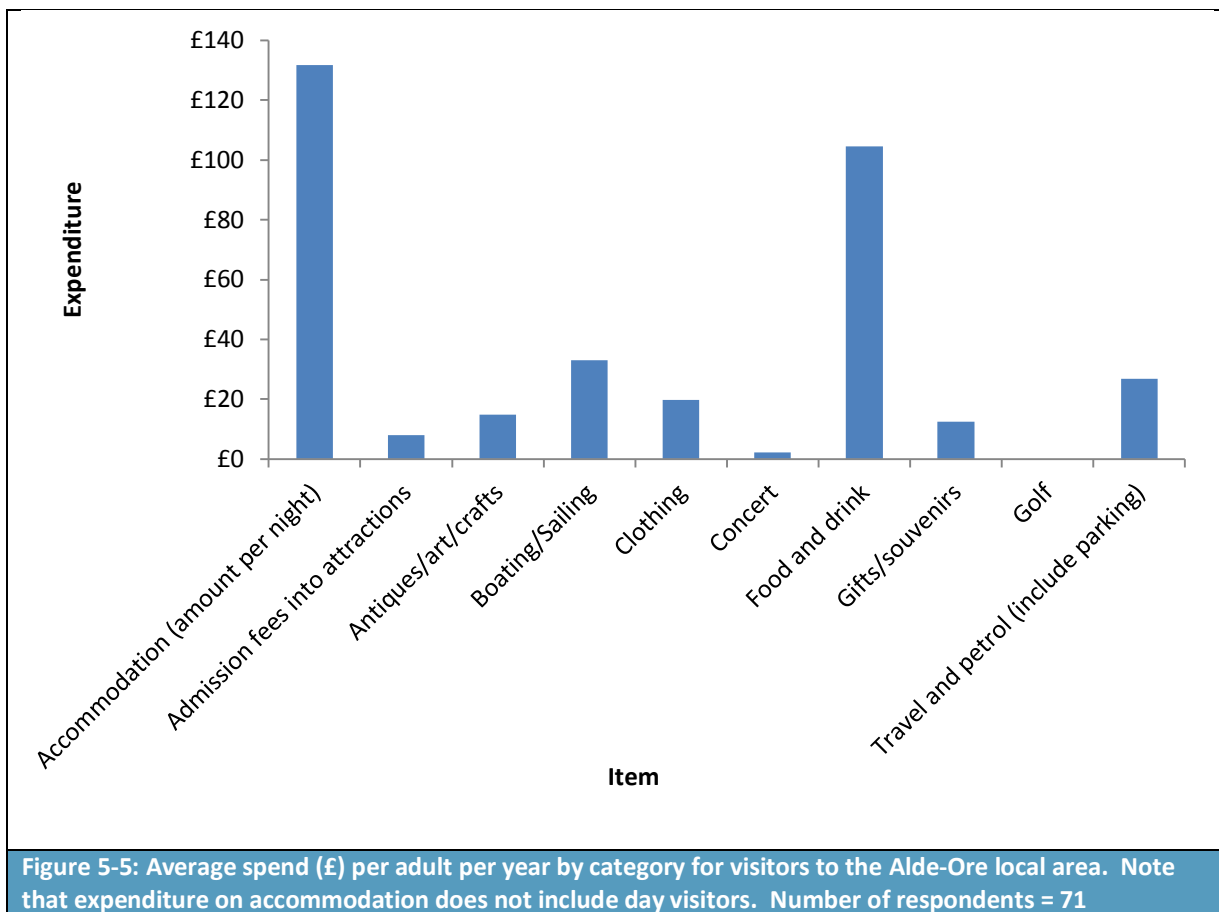
'Other' factor	Number of respondents agreeing that this was a factor that influenced their decision (ranked)	Percentage of individuals
Aldeburgh	25	51%
Shopping	6	12%
Sailing/boat trip	3	6%
Born here	3	6%
Day out/part of holiday itinerary	3	6%
Orford Castle/history	1	2%
Always wanted to come	1	2%
Food festival	1	2%
Golf	1	2%
Work	1	2%
Sport	1	2%
Party, photography	1	2%
Britten	1	2%
Number of respondents	49	

Expenditure per adult visitor per year was calculated using the average number of trips per year for each visitor group (Table 5-10).

Table 5-10: Mean number of trips per year by different groups of visitors to the Alde-Ore local area

Visitor Group	Average number of trips
Staying in temporary holiday accommodation in the Alde-Ore local area	5.3
Visiting the Alde-Ore local area for the day	4.7
Resident outside of the Alde-Ore local area	4.7
Staying in holiday accommodation outside the Alde-Ore local area	1.5

The overall average spend per adult visitor was £353.46 per year. Visitor expenditure was highest for accommodation (£132 per adult per night per year), the second highest expenditure being food and drink at £104 per adult per year (Figure 5-5). Boating and sailing was the third highest expenditure by visitors in the Alde-Ore local area at £33 per adult per year.



In order to compare expenditure with the previous study, the average expenditure per party per trip was calculated. The mean expenditure on accommodation per night has decreased from £109 to £79 per party per trip (Table 5-11). Expenditure by visitors to the Alde-Ore local area on food and drink was £68 per person per trip, an increase of £27 from 2004. Similar to expenditure by home and second homeowners, the amount spent on gifts and souvenirs has decreased slightly since 2004.

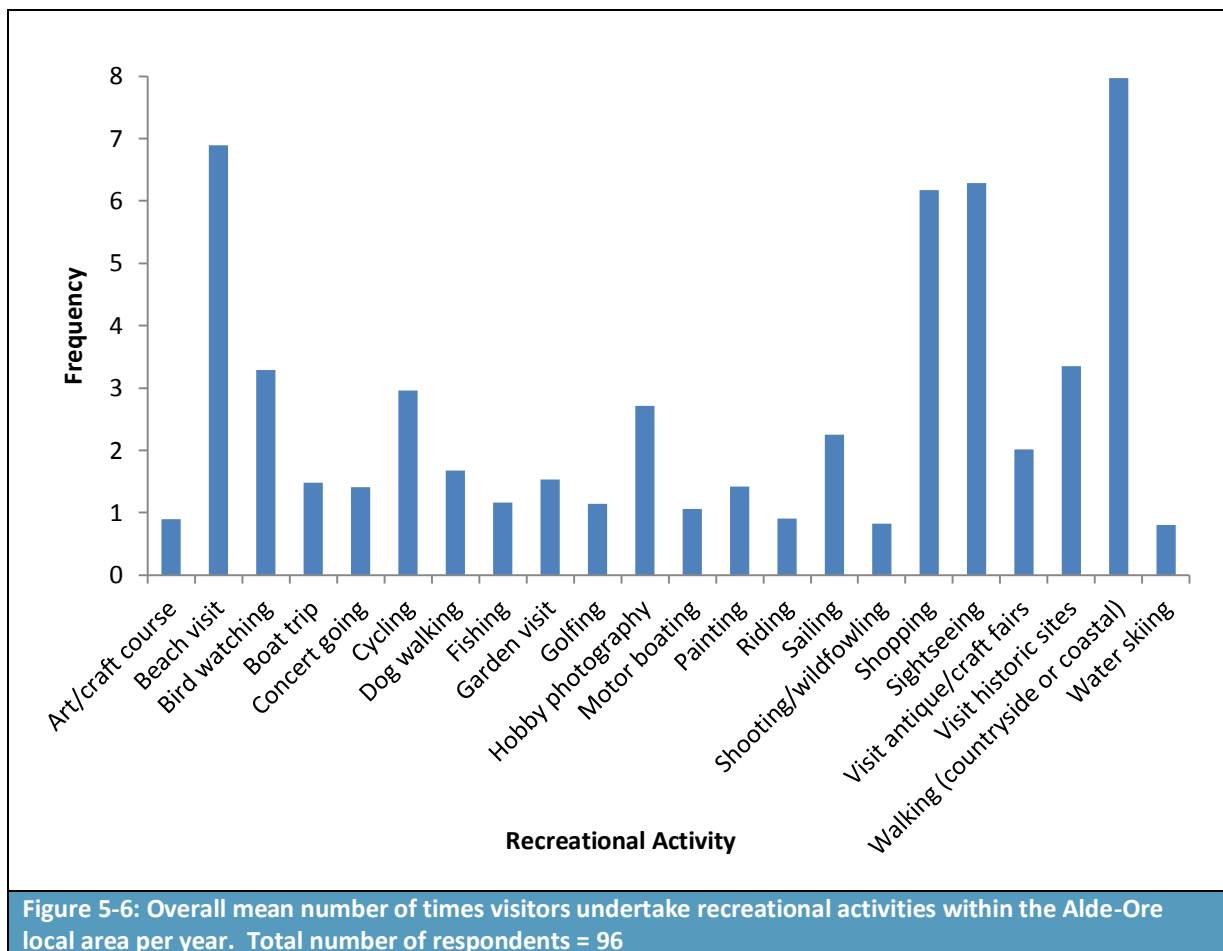
Table 5-11: Mean expenditure per party per trip by visitors to the Alde-Ore local area and comparison with expenditure in 2004 (in 2013 prices), showing percentage change

Item	Mean expenditure per party per trip (ranked)	N	Mean expenditure per party per trip in 2004 in 2010 prices	2004 N	Percentage change from 2004 to 2013
Accommodation* (amount per night)	£79	46	£109	138	-27%
Food and drink	£68	70	£41	595	+64%
Shop self-cater	-	70	£39	138	-
Boating/Sailing	£24	70	-	595	-
Specialist equipment	-	70	£2	595	-
Travel and petrol (including parking)	£18	70	£7	595	+135%
Clothing	£12	70	£7	595	+79%
Antiques/arts/crafts	£10	70	£5	595	+100%
Gifts/souvenirs	£7	70	£10	595	-26%
Admission fees into attractions	£6	70	£2	595	+150%
Concert	£2	70	£2	595	0%
Golf	£0	70	£1	595	-100%
Total	£225	70	£226	595	-5%

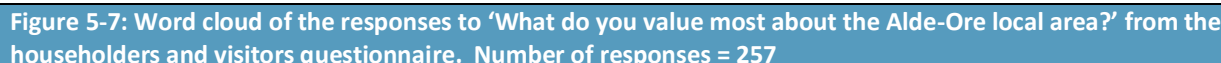
*Accommodation expenditure does not include day visitors

Notes: Some categories differ between studies and thus no comparison can be made. 2004 prices have been updated to 2013 prices to take account of inflation using CPI values from the Office of National Statistics <http://www.ons.gov.uk/ons/datasets-and-tables/data-selector.html?cdid=D7BT&dataset=mm23&table-id=1.1>

Walking is the most popular activity undertaken by visitors to the Alde-Ore local area (mean number of times per year = 8 per visitor, Figure 5-6). Visiting the beach was the second most popular activity (mean number of visits = 7 times per person per year), and sightseeing and shopping both had an average of 6 times per person per year. Sailing, dog walking, garden visit, and antique/craft fairs all had an average number of visits of 2 times per person per year. Water skiing and shooting/wildfowling were the least popular activities undertaken by visitors (<1 times per person per year). The previous study found similar leisure activity preferences by visitors to the area, with sightseeing the most popular (73% of visitors indicated that they had already undertaken this activity), closely followed by countryside and coastal walking (67% had already undertaken this activity), and shopping was the third most popular activity with 50% of visitors having already undertaken this. Water skiing and shooting/wild fowling were the least popular activities by visitors with > 98% of visitors indicating that they did not intend to undertake these activities.



The most popular words given in responses to the question regarding what people value most about the Alde-Ore local area are shown in Figure 5-7, by householders and visitors combined. The most popular words being: scenery, tranquillity, countryside, beauty, and peace. This is based on 276 responses, of which 19 comments were not included as they were considered not to relate to the question or would not have been accurately represented by the wordcloud format/selection process



5.3 Yachting and Sailing Questionnaire

The majority of respondents were members of the Aldeburgh Yacht Club (37%), followed by Slaughden Sailing Club (35%) and Orford Sailing Club (26%) (Table 5-12). This is similar to the findings of the 2004 survey, although in the previous study a higher proportion of respondents were members of Orford Sailing Club than Slaughden Sailing Club. The current approximate club membership is as follows: Aldeburgh Yacht Club = 1,800 members⁹, Orford Sailing Club = 580 members¹⁰, and Slaughden Sailing Club = 300 members¹¹.

Table 5-12: Membership to yachting and sailing clubs inside and outside the Alde-Ore local area and comparison with the 2004 study			
Yachting/Sailing Club	Number of respondents who indicated membership to Yachting and Sailing clubs	Percentage of individuals	Percentage of individuals from 2004 survey
Aldeburgh Yacht Club*	48	37%	54%
Slaughden Sailing Club*	46	35%	13%
Orford Sailing Club*	34	26%	24%
Other club inside the Alde-Ore local area*	3	2%	-
Other club outside the Alde-Ore local area	11	8%	-
Not a member of any club	2	2%	12%
Number of respondents	131		397
*Clubs within the Alde-Ore local area. Note: Respondents could indicate membership to more than one club. Some categories were not included in the previous study.			

In terms of respondent location, the majority of respondents were permanent residents inside the Alde-Ore local area (50%), followed by home and second homeowners outside the Alde-Ore local area (21%) and second homeowners inside the Alde-Ore local area (16%) (Table 5-13).

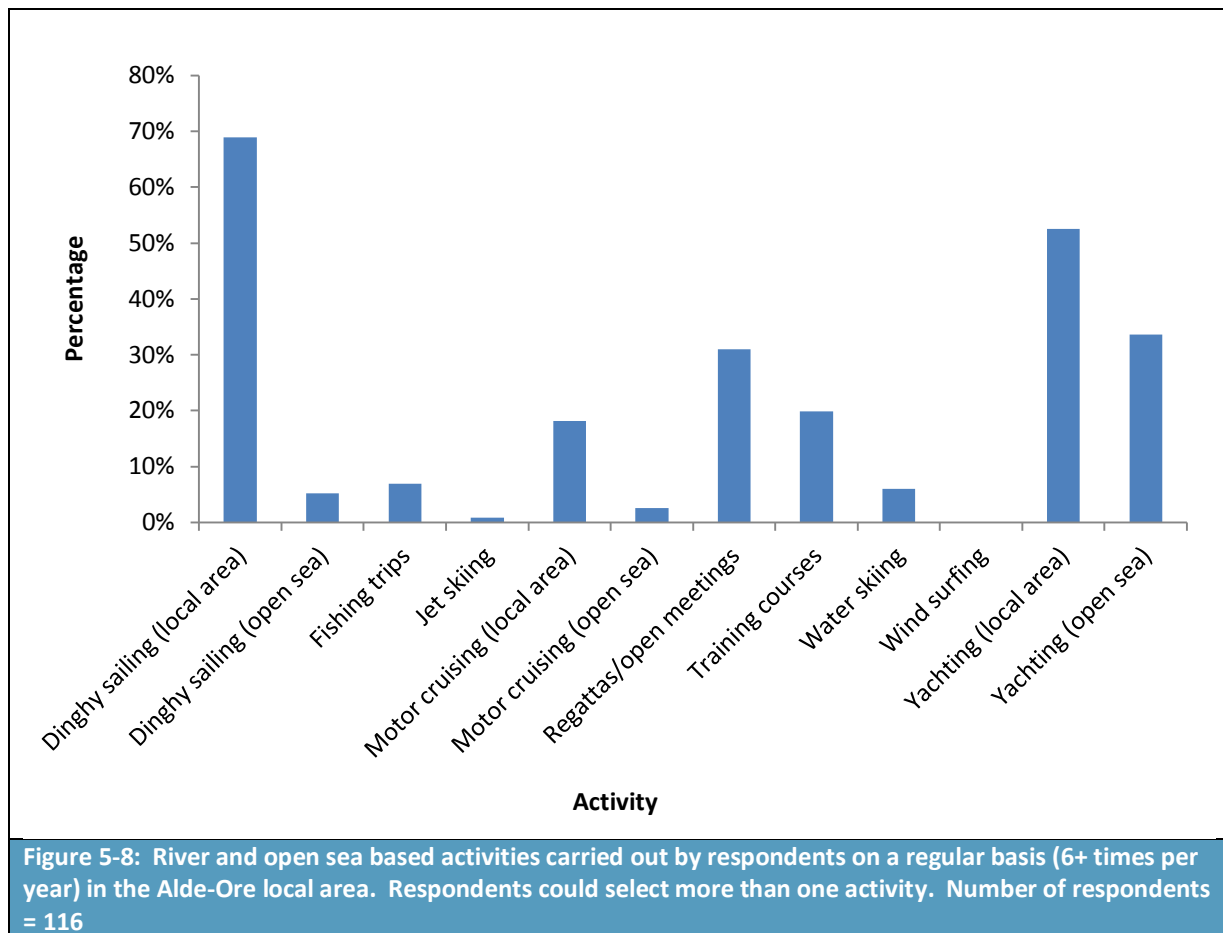
Table 5-13: Location of respondents		
Location of respondents	Number of respondents	Percentage of individuals*
Holiday accommodation inside the Alde-Ore local area	9	8%
Holiday accommodation outside the Alde-Ore local area	0	0%
Other inside the Alde-Ore local area	4	3%
Other outside the Alde-Ore local area	3	3%
Permanent home inside the Alde-Ore local area	58	50%
Second home inside the Alde-Ore local area	19	16%
Permanent home/second home outside the Alde-Ore local area	24	21%
Number of respondents	117	
*Percentages do not total 100% due to rounding.		

⁹ Aldeburgh Yacht Club website: <http://www.aldeburghyc.org.uk/>

¹⁰ Orford Sailing Club website: <http://www.orfordsail.org.uk/>

¹¹ Slaughden Sailing Club website: <http://www.slaughdensailingclub.co.uk/home.php>

Respondents spend an average of 40 days per year sailing (117 respondents), and mainly take part in dinghy sailing (69%) and yachting (53%) in the local area, as opposed to open sea (Figure 5-8).

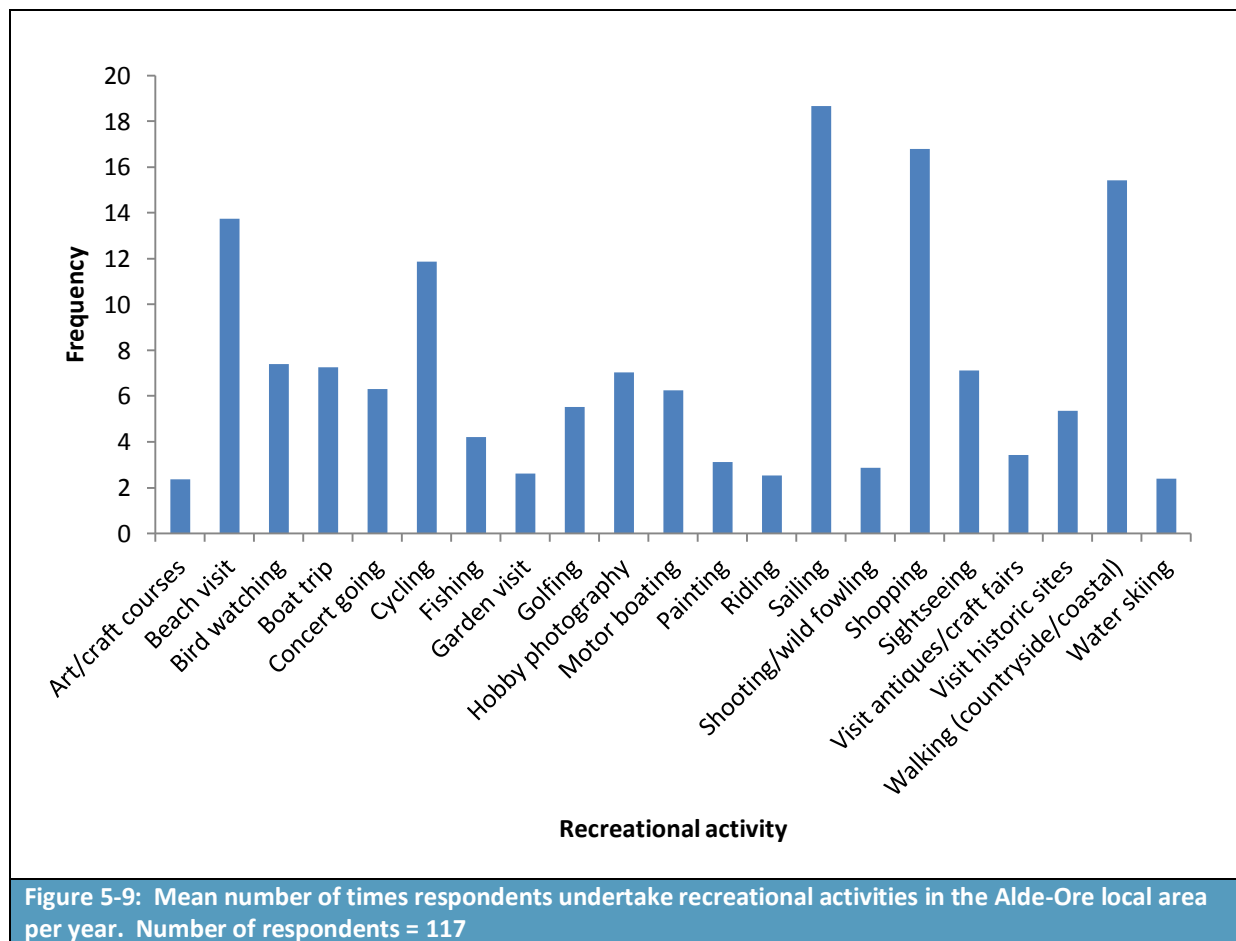


Respondents indicated that there are a large number of benefits for sailing in the Alde-Ore local area (Table 5-14). Over 50% of respondents indicated that 9 out of 14 advantages listed in the questionnaire (excluding 'other') were benefits for sailing in the area, with no one advantage falling below 30% agreement. Nearly all of the respondents felt that an attractive environment was an advantage for sailing in the Alde-Ore local area (96%, see Table 5-14). The facilities offered by the local sailing clubs as well as the safe waters had the equal second highest number of respondents (76% of individuals). The 'other' category included factors such as the ease of watching wildlife whilst using the river and the local community's relationship with water users (see Annex 3 for full list).

Table 5-14: Proportion of respondents who agreed to various factors being an advantage for sailing in the Alde-Ore local area

Advantage for sailing in the Alde-Ore area	Number of respondents who considered factor an advantage for sailing in the Alde-Ore local area	Percentage of individuals
Attractive environment	112	96%
Safe waters	89	76%
Yacht/sailing club facilities	89	76%
Ease of sailing here	75	64%
Challenge of sailing here	76	65%
Available anchorages/moorings	75	64%
Boatyard repair/maintenance	68	58%
Access to other coastal sailing areas	66	56%
Restaurants/pubs in area	66	56%
Visit local towns/villages	57	49%
Variety of waters	56	48%
Ease of access to the sea	53	45%
Training courses	51	44%
Regattas/open meetings	46	39%
Other	12	10%
Number of respondents	117	
Note: respondents could indicate more than one advantage.		

Respondents also took part in a number of other activities in the Alde-Ore local area. Unsurprisingly, the most popular activity was sailing (mean number of times per year = 19 per year, Figure 5-9). Other popular activities included shopping (mean number of times = 17 per year) and walking (mean number of times = 15 per year).



Respondents spent an overall average of £1,611 per household per year on expenditure related to sailing activities (132 respondents), this is 19% lower than the total expenditure in 2004 on sailing activities, which was £1,975 per household per year (updated to 2013 prices)¹². The highest amount of expenditure in the current study was on food and drink (£338 per household per year). The second highest expenditure was on vessel maintenance with an average annual spend of £273 per household, representing a 38% decline from 2004 (see Table 5-15). Expenditure on exceptional vessel repairs were also higher in 2004 (£214 compared to £104 per household per year in the current study). In contrast, current expenditure on petrol and diesel fuel was higher by 45% compared with 2004 (£108 compared to £75 per household per year).

Table 5-15: Mean expenditure on sailing related activities per household per year in the Alde-Ore local area and comparison with 2004 data (in 2013 prices) showing percentage change					
Item	Mean expenditure per household per year (ranked)	N	Mean expenditure per household per year in 2004 in 2010 prices	2004 N	Percentage change from 2004 to 2013
Food and drink	£338	132	£335	377	+1%
Vessel maintenance (regular/annual)	£273	132	£440	377	-38%
Moorings	£225	132	£196	377	-11%
Membership fees (clubs)	£170	132	£185	377	-8%
Chandlery Items	£108	132	£113	377	-4%
Petrol/diesel fuel	£108	132	£75	377	+45%
Vessel repairs (exceptional)	£104	132	£214	377	-51%
Winter storage	£99	132	£113	377	-12%
Specialist clothing	£55	132	£81	377	-32%
Specialist sailing equipment	£42	132	£71	377	-41%
Training courses	£34	132	£36	377	-6%
Landing/docking fees	£31	132	£30	377	+5%
Entry Fees (regattas/open meetings)	£22	132	£22	377	+2%
Sailing licences	£2	132	£9	377	-80%
Total	£1,611	132	£1,975	377	-19%

¹² Though the previous study had a much higher sample size with 377 respondents.

Comparing the expenditure by club members (using data from the current study) indicates that members of Aldeburgh Yacht Club spend more than members of the Slaughden and Orford Sailing Clubs, with members of Slaughden Sailing Club having the lowest average annual expenditure per household per year (Aldeburgh Yacht Club = £2,606; Slaughden Sailing Club = £1,088; Orford Sailing Club = £1,437, see Table 5-16). However, an element of caution is required here, as the sample sizes per club are relatively small (Number of respondents by club: Aldeburgh Yacht Club = 41; Slaughden Sailing Club = 40; and Orford Sailing Club = 28). In particular, the main differences in expenditure between club members are on vessel maintenance with an average annual spend of £525 for members of Aldeburgh Yacht Club compared to £157 and £163 per household for Slaughden and Orford Sailing Clubs respectively. Membership fees are also higher for Aldeburgh, averaging £263 for Aldeburgh Yacht Club compared to £131 and £151 per household per year for Slaughden and Orford Sailing Clubs respectively.

Table 5-16: Expenditure on sailing related activities within the Alde-Ore local area by members of the three main sailing clubs			
Item	Aldeburgh Yacht Club	Slaughden Sailing Club	Orford Sailing Club
Chandlery Items	£155	£100	£102
Entry Fees (regattas/open meetings)	£46	£15	£12
Food and drink	£491	£237	£394
Landing/docking fees	£47	£11	£27
Membership fees (clubs)	£263	£131	£151
Moorings	£328	£152	£272
Petrol/diesel fuel	£156	£54	£108
Sailing licences	£1	£3	£1
Specialist clothing	£68	£64	£39
Specialist sailing equipment	£72	£33	£31
Training courses	£59	£17	£26
Vessel maintenance (regular/annual)	£525	£157	£164
Vessel repairs (exceptional)	£235	£45	£50
Winter storage	£159	£70	£59
Total Expenditure	£2,606	£1,088	£1,437
Number of respondents	41	40	28
Note: Where respondents are member of more than one club, their total expenditure has been split equally between clubs to avoid double counting.			

Using the average spend per club, gives an estimated total expenditure on yachting and sailing within the Alde-Ore local area of just over £3 million per year. This is based on the average spend per person per year (using average party size: Aldeburgh Yacht Club = 1.9; Slaughden Sailing Club = 2.2 and Orford Sailing Club = 2) and the total number of club members for each of the three main clubs (Table 5-17).

Table 5-17: Expenditure on yachting and sailing related activities within the Alde-Ore local area			
Club	Mean expenditure in the Alde-Ore local area per person per year	Total number of club members*	Total expenditure on yachting and sailing in the Alde-Ore local area £million (to two significant figures)
Aldeburgh Yacht Club	£1380	1800	£2.5
Slaughden Sailing Club	£521	580	£0.3
Orford Sailing Club	£746	300	£0.2
Total		2680	£3
*As given on the club websites (2013). No. of respondents by club: Aldeburgh Yacht Club = 41, Slaughden Sailing Club= 40, Orford Sailing Club = 28.			

However, given the relatively small sample size by club membership, a slightly more cautionary estimate using the average spend by all respondents and an average party size of 2 gives £806 per person per year. This gives a total annual average spend on yachting and sailing activities of approximately £2.2 million in the Alde-Ore local area (using the total number of club members). In 2004, the estimated total annual spend for yachting and sailing related activities was £1.9 million. Given that expenditure on yachting and sailing activities declined by almost 20% from 2004 (Table 5-15), it seems appropriate to use the more conservative estimate of total expenditure of £2.2 million in the overall analysis.

The most popular words given in responses to the question regarding what people value most about the Alde-Ore local area are shown in Figure 5-10, by respondents of the yachting questionnaire. The most popular words being: sailing, unspoilt, beauty, river and peace. This is based on 105 responses, of which a small proportion of comments were not included as they were considered not to relate to the question or would not have been accurately represented by the word cloud format/selection process.



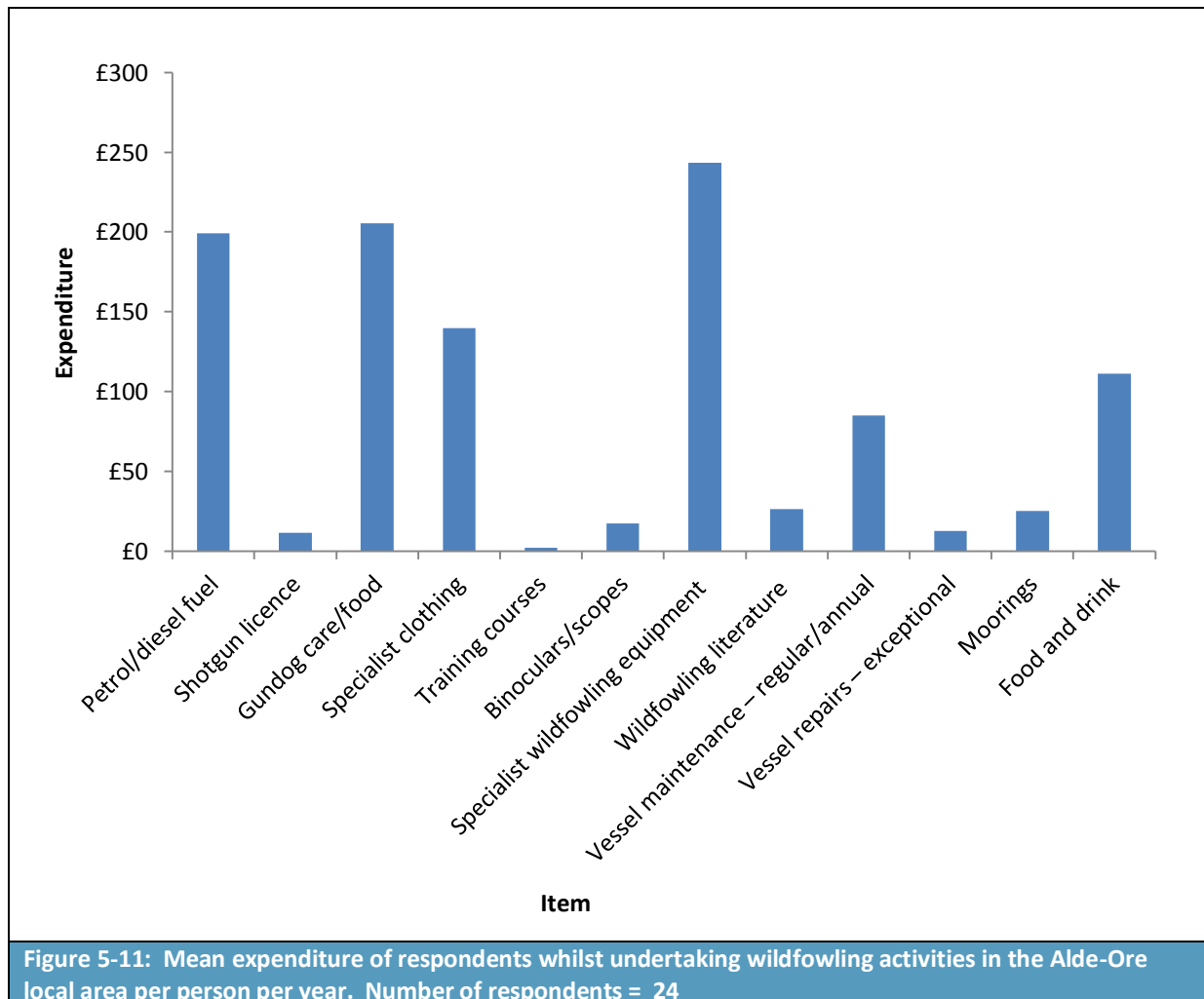
5.4 Wildfowling Questionnaire

The majority of respondents who undertake wildfowling activities inside the Alde-Ore local area came from outside the local area (60%, number of respondents = 30). Around 40% of respondents were residents in the local area (see Table 5-18).

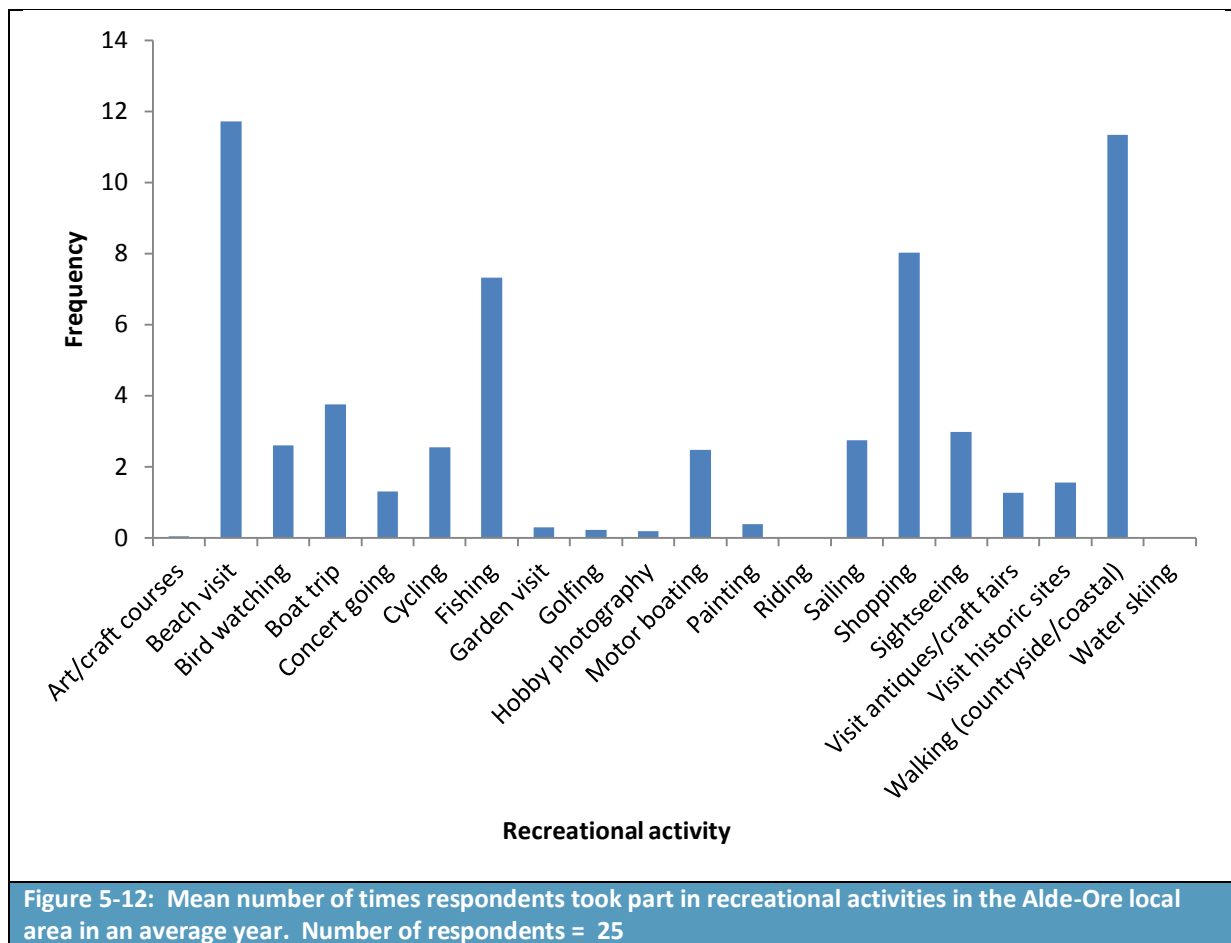
Table 5-18: Location of respondents whilst undertaking wildfowling activities in the Alde-Ore local area		
Location	Number of respondents (ranked)	Percentage of individuals
Permanent home INSIDE the Alde-Ore local area	12	40%
Permanent home/second home OUTSIDE the Alde-Ore local area	7	23%
Other OUTSIDE the Alde-Ore local area	6	20%
Holiday accommodation INSIDE the Alde-Ore local area	3	10%
Holiday accommodation OUTSIDE the Alde-Ore local area	2	7%
Other INSIDE the Alde-Ore local area	0	0%
Second home INSIDE the Alde-Ore local area	0	0%
Number of respondents	30	

Respondents spend an average of 16 days per year taking part in wildfowling activities in the Alde-Ore local area (number of respondents = 24). A high percentage of respondents own a boat for wildfowling activities: 65% of respondents, 25 respondents.

The overall average spend per year within the Alde-Ore local area was £1,079 per person. Specialist wildfowling equipment including shotguns, decoys and cartridges was the category with the highest amount of expenditure at £243 per person per year (Figure 5-11), followed by expenditure on gundog care and food at £205 per person per year. Petrol and diesel fuel accounted for around 18% of total expenditure at £199 per person per year.



Respondents also indicated that they took part in a number of other activities in the Alde-Ore local area. The most popular activities were beach visits (mean = 12 times per year); countryside/coastal walking (mean = 11 times per year); shopping (mean = 8 times per year) and fishing (mean = 7 times per year) (see Figure 5-12).



The most popular words given in responses to the question regarding what people value most about the Alde-Ore local area are shown in Figure 5-13, by wildfowlers. The most popular words being: countryside, wildlife, beauty, natural and wildfowl. This is based on 25 responses, of which a small proportion of comments were not included as they were considered not to relate to the question or would not have been accurately represented by the word cloud format/selection process.



5.5 Businesses Questionnaire

A total of 37 businesses within the Alde-Ore local area responded to the questionnaire, covering a range of businesses from retail to accommodation.

Table 5-19 compares the percentage of businesses by business category that completed a questionnaire in comparison to the proportion of each held within the business database supplied by the Alde-Ore Association, which was compiled during the Alde & Ore Futures project. This database lists 227 local businesses with a non-residential property located within the Alde-Ore local area. The businesses were separated into 13 different categories dependent upon the services they provided, for example Table 5-19 shows 12% of the 227 business listed were focused on tourism. Overall, there was a fairly close match between the percentages of business categories in the database and the questionnaire responses (for example, 22% of business in the database and questionnaire responses were from retail businesses). There is an over representation within the food sales category and under representation within the cultural category. There were no responses from the financial category. This could suggest some bias in the form of self-selection from companies which have a vested interest in the local natural environment (for example, businesses selling locally grown produce). It should also be noted that there were several other questionnaire surveys running at a similar time to this one possibly causing respondent fatigue.

Sectors	Amount in database	% of database sectors	Represented in surveys	Number of survey responses	% of responses (102% Due To Rounding)
Automotive	8	4%	Y	1	3%
Boating	7	3%	Y	1	3%
Catering	34	15%	Y	5	14%
Community	3	1%	Y	1	3%
Cultural	15	7%	Y	1	3%
Farm	15	7%	Y	2	5%
Financial	3	1%	Y	0	0%
Food sales	9	4%	Y	4	11%
Industry	7	3%	N	1	3%
Leisure	9	4%	Y	2	5%
Retail	50	22%	Y	8	22%
Service	39	17%	Y	7	19%
Tourism	28	12%	Y	4	11%

Table 5-20 provides the numbers of non-residential properties located within the 13 flood cells in the Alde-Ore local area; there are a total of 695 within the flood cells, 66% of which are below the crest level. A significant proportion of the total non-residential properties are situated within flood cell 10n (north); the total number of non-residential properties within this cell includes caravans. The overall total also includes properties at Snape Maltings and the young offenders institute at Hollesley.

Table 5-20: Total number of non-residential properties within flood cells				
Flood Cells	Within flood cell/coastal study unit	At elevations lower than the lowest crest level	At elevations higher than the lowest crest level	At risk from erosion
FC1	72	10	62	0
FC2	21	14	7	0
FC3	18	1	17	0
FC4	97	52	45	0
FC5	21	4	17	0
FC6	46	26	20	0
FC7	22	3	19	0
FC8	0	0	0	0
FC9	0	0	0	0
FC10s	48	17	*13	2
FC10n	**350	325	25	0
FC11	0	0	0	0
FC12	0	0	0	0
FC13	0	0	0	0
Total	695	452	225	2
*13 properties lower than the estuary defence, however all lower than the coastal defence				
** includes caravans				
Source: Alde and Ore Futures, 2011				

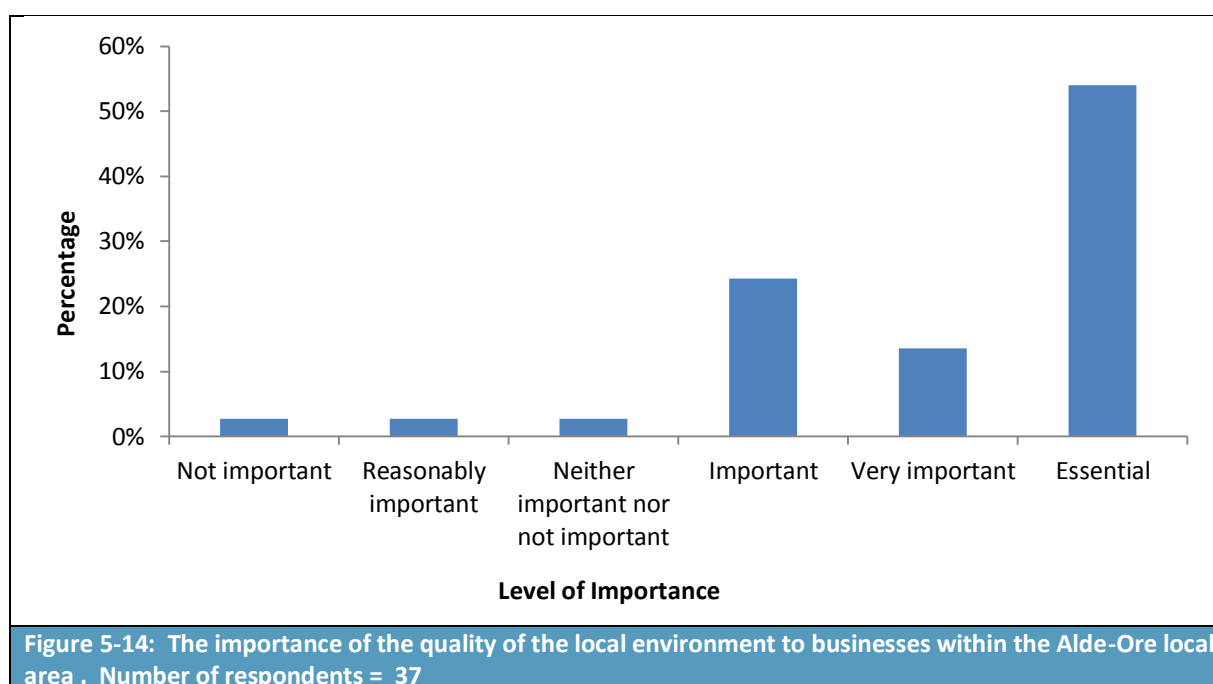
Table 5-21 below estimates the total number of non-residential properties within the Alde-Ore local area. Four postcodes cover the area used for this study: IP12, IP15, IP16 and IP17. The third column estimates the percentage of the Alde-Ore study area which is situated within the postcode boundaries i.e. 100% of IP15 is situated within the Alde-Ore local area boundary. The total number of non-residential properties for each postcode area was obtained from searching the Valuation Office Agency website (minus the deleted entries). The estimated total number of non-residential properties within the Alde-Ore local area is 1135. This estimate should be treated with caution when used to estimate the number of businesses within the Alde-Ore local area. This is because the estimates are generated assuming an even distribution of non-residential buildings throughout each postcode; however this may not be the case as properties tend to be built in groups. In addition, the VOA lists non-residential and therefore estimates may over represent the number of businesses within a postcode as one business may own several non-residential properties. This estimate still gives an indication of the number of businesses located within the Alde-Ore area and suggests that only a small proportion of businesses completed the questionnaire (3%).

Table 5-21: Non-residential property estimation within Alde-Ore local area. Source: Valuation Office Agency website (VOA)			
Postcode	Total number of results from VOA	Estimation of non-residential property within Alde-Ore local area	Estimated non-residential properties within the Alde-Ore local area
IP12	1182	60%	710
IP15	335	100%	335
IP16	377	15%	60
IP17	571	5%	30
Total	2465	-	1135

From the questionnaire responses, a total of 518 jobs were supported by the 35 businesses, with the average number of full-time employees being 5.8 (Table 5-22). The average total cost of wages as a percentage of gross annual turnover was 23% (number of responses = 32), with the average gross annual turnover falling within the '£500,000 to 1 million' category (average taking mid-points = £582,353, number of responses = 34), though the highest percentage of businesses fell within the 'over £1 million' category with 29% of businesses.

Employment type	Mean number of employees	Min	Max	Total
Full time	5.8	1	25	202
Part time	4.6	1	20	161
Seasonal (Full Time Equivalent)	3	1	50	104
Volunteer (Full Time Equivalent)	1.5	0	50	51
Number of responses	35			

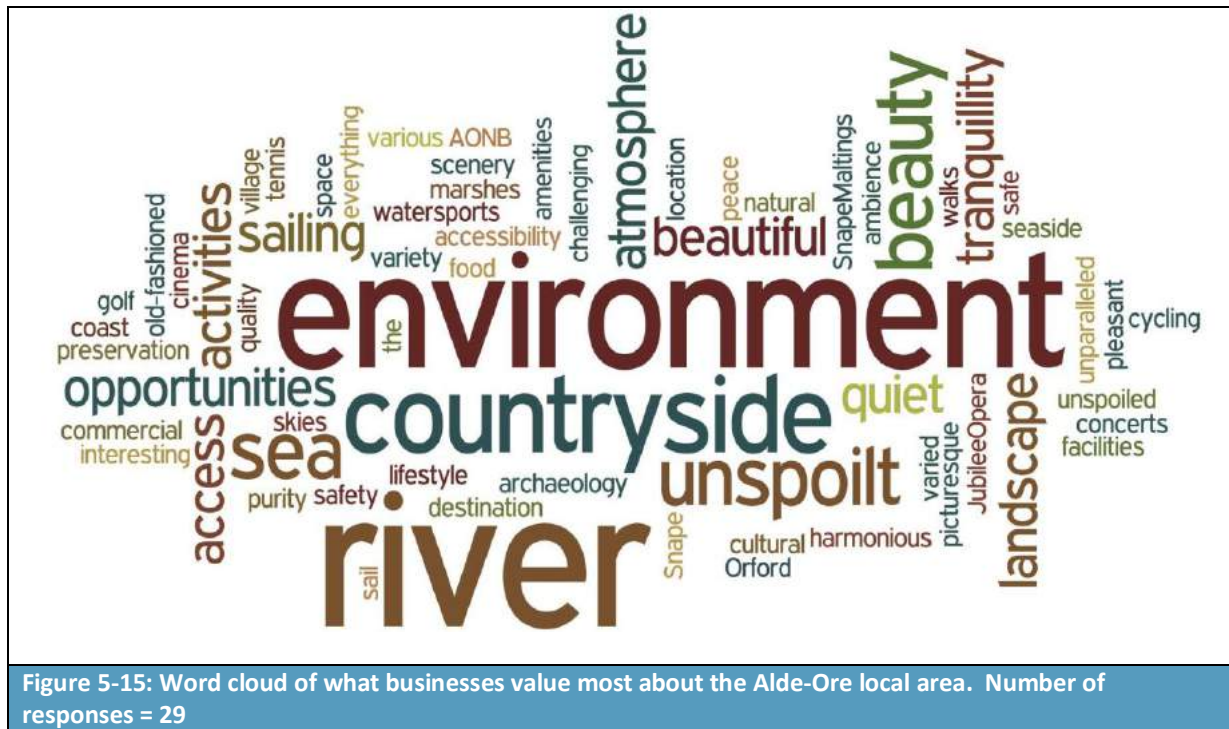
In terms of the relationship and linkages with the environment, over half of respondents indicated that the quality of the local environment was essential to their business (54%, Figure 5-14), with only a small number of businesses indicating that the environment was not important or reasonably important (3% in both cases). Respondents estimated that the environment contributed highly (High 50-100%) to their businesses (number of respondents = 37). More specifically, a total of 31 of 36 businesses (86%) said that their business would be affected should river activities in the Alde-Ore local area no longer be possible resulting in a decline in visitor numbers. A number of additional comments were also received such as: 'the availability of fresh water for irrigation is essential'; 'business would cease and not be viable should the environment decline' (see Annex 5 for full list). There may be some self-selection here in terms of respondents to the questionnaire. For instance, businesses which have a stronger relationship to the environment and, hence, greater concern for its future condition, may be more likely to respond. The results may, therefore, under-represent businesses for whom the environment is not important.



In terms of gross annual turnover, businesses indicated that the majority of turnover occurs during April to September, accounting for 61% of turnover. The remainder occurring during the period from October to March (number of responses = 31). This corresponds with the peak tourist season, thus suggesting that businesses in the Alde-Ore local area are heavily reliant on tourism and visitors to the area. The types of recreational activities that respondents indicated contribute to their business are given in Table 5-23. Beach visits (39%), walking (36%), shopping (36%), concert going (34%) and sailing (32%) were the activities considered to contribute the most to businesses within the Alde-Ore local area. Garden visits and water skiing were among those activities indicated to have a low contribution to businesses (9%). Again, this may reflect that businesses which perceived more of their income to be associated with the environment were more likely to respond to the questionnaire.

Table 5-23: Contribution of recreational activities to businesses within the Alde-Ore local area	
Activity	Contribution to business (average)
Beach visit	39%
Walking (countryside/coastal)	36%
Shopping	36%
Concert going	34%
Sailing	32%
Golfing	24%
Visit historic sites	20%
Boat trip	20%
Cycling	20%
Motor boating	18%
Art/craft courses	17%
Painting	14%
Fishing	13%
Shooting/wildfowling	13%
Hobby photography	13%
Visit antiques/craft fairs	12%
Riding	11%
Garden visit	9%
Water skiing	9%
Number of responses	34
Note: Original question asked for the following categories: No contribution; Low (1-25%); Medium (25-50%); and High (50-100%). Averages were calculated using the mid-point of each category.	

The most popular words given by businesses in responses to the question regarding what people value most about the Alde-Ore local area are shown in Figure 5-15. The most popular words being: river, environment, countryside, unspoilt and beauty. This is based on 29 responses, of which a small proportion of comments were not included as they were considered not to relate to the question or would not have been accurately represented by the word cloud format/selection process.

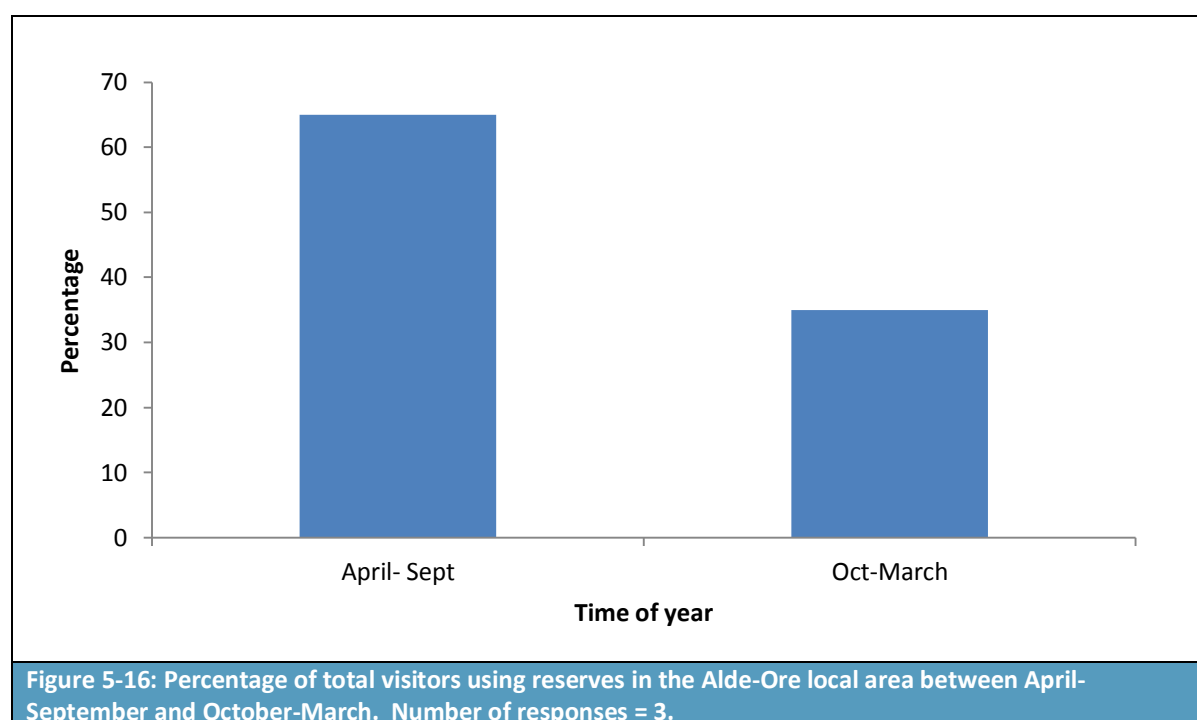


5.6 Reserves Questionnaire

There are several different nature reserves within the Alde-Ore local area; each varies in habitat type, size, designation, species attracted and visitor popularity. Table 5-24 provides a list of managed natural areas located within the Alde-Ore local area.

Table 5-24: Nature reserves or forests within the Alde-Ore local area		
Name of Reserve	Description	Owners/Management
Rendlesham Forest Centre	Site consists of tree plantations, heathland and wetlands with two circular (1.2km and 5km) walks passing through. Entrance is free; however the car park is not	Forestry Commission
Orford Ness	Shingle spit covered by fragile vegetation and containing buried bombs. The site is only accessible by ferry. Entry and ferry are not free	National Trust
Havergate Island	Small island within the River Ore and only accessible by boat. The SSSI consists of saline lagoons, marshes, shingle and mudflats	RSPB
Hazlewood marshes	64 ha SSSI mosaic habitat containing untrained grazing marshes. The site attracts Snipes, Avocets and Marsh harriers. Entrance is free	Suffolk Wildlife Trust
Snape Marshes	19.8 ha of mosaic habitat including fen, grazing marches and shrub. Entrance is free	Suffolk Wildlife Trust
Blaxhall common	44 ha SSSI and Natura 2000 heathland. The site is occasionally grazed by sheep and ponies. Entrance is free	Suffolk Wildlife Trust
Tunstall Forest	Part of the Suffolk Coasts and Heaths AONB and the site consists of heathland, tree plantations and broadleaves belts. Entrance is free	Forestry Commission
Captains Wood	56 ha of mostly open woodland. Some of the species found within this wood are bluebells and English oak. Entrance is free	Suffolk Wildlife Trust
Sutton and Hollesley Common	440 ha of heathland periodically grazed by sheep and ponies. Species seen here include hen harriers, pipistrelle bat and green tiger beetle. Entrance is free	Suffolk Wildlife Trust
Boyton Marshes	Grazing marshland next to the Butley River. The site floods during winter attracting wading birds. Entrance is free	RSPB
North Warren	SSSI consisting of reedbeds, woodland, grazing marshes and heathland. Entrance is free	RSPB
Snape	Newly restored/created reserve consisting of Snape Wetlands (consisting of Abbey Farm Warren and Botany Marsh) and Snape Warren	RSPB

Reserve questionnaires were completed for five sites within the Alde-Ore local area¹³. The quality of the local natural environment is seen to be either very important (3/5 reserves) or essential (2/5 reserves) to attracting visitors to the sites. Figure 5-16 shows the seasonal spread of visitors to each site or managed area, with the majority of visitors received during April to September (65%). However this varied from 50% to 95% during April to September which may be due in part to the opening times of each site, with some being open all year round while others are closed from the end of October until Easter, thus limiting the seasons in which people can visit. The fairer weather often seen in the months between April and September is likely to play a role in increasing visitor numbers during these months.



Visitor numbers are not recorded at most of the reserves, however it is estimated that the five sites receive a combined 11,150 visitors annually. Visitor number to each site varied from 150 to 8,000 per year, which could be due to the comparative differences in size between reserves, as well as other factors such as promotion and location.

The turnover at each site varies and is dependent upon a range of factors. Most of the turnover is generated through entrance fees, grants (such as agri-environment schemes) and charity donations. Gross annual turnover at the 5 sites ranged between <£100,000 and £500,000. The total gross revenue achieved by each reserve is highly variable and dependent upon several factors including visitor numbers (revenue through entrance fees and donations), grants awarded and in-house charity funding. Much of the revenue is spent within the local economy through the purchase of services and materials for maintenance and conservation.

¹³ Completed via three questionnaires

Local staff are also employed within the sites and thus the indirect economic benefits extend further through their spending within the local area. Staff levels vary considerably between each site which may be in part due to reserve size and visitor numbers (see Table 5-25). The average number of full time staff is 1.2 persons per year with a total of 6 staff across the 5 reserves. The total number of paid and volunteer staff for the 5 reserves is 15.8.

Table 5-25: Number of staff employed at reserves in the Alde-Ore local area. Number of responses =3 (5 reserves)				
	Full time	Part time	Seasonal (Full Time Equivalent)	Volunteer (Full Time Equivalent)
Mean	1.2	0.4	0.4	1.16
Min	0	0	0	0
Max	4	2	2	5
Total	6	2	2	5.8

Some of the reserves surveyed also have agricultural tenancies, mainly grazing and also haycut. Some of the reserves also rely upon the local infrastructure which is protected by the flood defences to aid physical management i.e. roads and clear access is required to bring in heavy machinery. However, if there were to be breaches or an estuary shape change it is likely that the reserves would remain, but with different management strategies in place.

5.7 Farming

Farming within the Alde-Ore local area is a significant contributor to the local economy and relies heavily on the availability of freshwater. Agriculture in this area is dominated by root crops, although forage maize is expected to increase in predominance due to its popularity in energy production (Peter Youngs Pers. Comm. 2013¹⁴).

As coastal Suffolk is one of the driest parts of the UK, the importance of water availability is high for agriculture. Farming accounts for 30% of total annual water used in the coastal Suffolk catchment (which encompasses the Alde-Ore local area), although in times of low flow and high temperatures abstraction for agriculture can reach 66% of total daily use (NFU, 2010). Most water for irrigation in the Alde-Ore area is abstracted from groundwater sources (40-50% of water abstracted) due to the reliability of the supply. Some farmers abstract from rivers, however these sources can be subject to restrictions, thereby making them less reliable as a source of water. The construction of storage reservoirs is an alternative to abstraction from groundwater or rivers and the Environment Agency estimates that around 26% of water abstracted for irrigation within East Suffolk is from on-farm reservoirs (NFU, 2010). However, reservoirs present an additional set of problems, such as the initial expense of construction (£500,000), and problems associated with co-operatives and the sharing out of the water (Peter Youngs Pers. Comm. 2013).

Table 5-26 shows the area of land within the Alde-Ore local area irrigated by abstraction, the crops grown and their output values (based on vegetable crops having an output value of between £4,000 and £5,000 per ha and cereals of £1,500 per ha¹⁵). The total value of agricultural output in the area therefore comes to between £8.8 million and £12 million per year.

¹⁴ East Suffolk Water Abstractions Group, Interview conducted: 30/10/2013

¹⁵ Peter Youngs Pers. Comm. 2013

Table 5-26: Agricultural production and output in the Alde-Ore local area. Source: Peter Youngs Pers. Comm. 2013¹⁶

Crop	Estimated area in the Alde-Ore local area (ha)	Estimated current output per year in £millions
Potatoes	600 – 750ha	£2.4 – £3.75
Onion	400ha	£1.6 – £2
Forage maize	300 – 400ha	£1.2 – £2
Carrots	200ha	£0.8 – £1
Lettuce and spring cabbage	100ha	£0.4 – £0.5
Sugar beet and cereals	1,600 – 1,850ha	£2.4 – 2.775
Total	3,000ha	£8.8 – £12.025

As well as the crops mentioned, water is abstracted for two plant nurseries in the area, one specialising in fruit production and one producing flowers (Peter Youngs Pers. Comm. 2013).

Within the Alde-Ore area there are up to 30 abstraction licences for irrigation, although not all those with a licence undertake abstraction. Without abstraction the quantity and quality of other crops would suffer, thereby reducing the value of outputs from the area. It is thus likely that the crops grown would be dominated by sugar beet and cereals. Table 5-27 shows the area of arable land within each flood cell (1-13) irrigated by abstraction points in the Alde-Ore local area. Without irrigation the value of land in Suffolk would drop from between £13,000 to £14,000 per ha to possibly £9,000 to £10,000 per ha, demonstrating the economic benefits of abstraction for this sector (Peter Youngs Pers. Comm. 2013).

Table 5-27: Area of arable land irrigated by abstraction points in each flood cell. Source: (Alde and Ore Futures, 2011)

Flood cell	Number of abstraction points	Area of arable land within flood cells (ha)	Area of arable land outside flood cells irrigated by abstraction points (ha)	Total area of arable land irrigated by the abstraction points (ha)
FC1	11	250ha	784ha	1,034ha
FC2	4	21ha	479ha	500ha
FC3	8	0	277ha	277ha
FC4	12	427ha	545ha	972ha
FC5	8	228ha	273ha	501ha
FC6	10	0	160ha	160ha
FC7	5	35ha	113ha	148ha
FC8	2	27ha	488ha	515ha
FC9	2	0	52ha	52ha
FC10s	1	0	0	0
FC10n	7	0	365ha	365ha
FC11	0	Private land (habitat and private property)	0	0
FC12	1	Private land (habitat)	0	0
FC13	1	Private land (habitat)	0	0
Total	72	988ha	3,536ha	4,524ha

¹⁶ East Suffolk Water Abstractions Group, Interview conducted: 30/10/2013

Agriculture in the Alde-Ore area contributes significantly to the rural economy of the UK as a whole. The Suffolk coastal area supports around 2,200 jobs, and many more in other industries such as food processing (NFU, 2010). The light, free draining soils and favourable climate with limited frost susceptibility ensure high productivity (NFU, 2010). The only other area of the country considered to have similarly advantageous growing conditions is Cornwall, however the area of land available for crops there is limited, and would not be able to take on the capacity of Suffolk should abstraction no longer be possible (Peter Youngs Pers. Comm. 2013).

One threat to farming and abstraction in the Alde-Ore area is seawater ingress. Occasional overtopping of the sea defences does not present a significant problem as salt water can be pumped out, however should the sea defences fail and sea water flow into the waterways within the Alde-Ore area, agriculture would suffer. Farmland itself is adversely affected by saltwater with implications for soil fertility (NFU, 2010) and water would be unusable for irrigation. It is thought that around 40% of water in the area of East Suffolk would be susceptible to saline ingress should the defences fail (Peter Youngs Pers. Comm. 2013). Ongoing farming losses due to lost produce and access to freshwater from seawall failure are estimated at around £36 million per year in the East Suffolk area (NFU, 2010). Estimates from the East Suffolk Water Abstractors Group survey suggest that should the sea wall fail 320ha of irrigated land in East Suffolk would be lost to the sea, and potentially a further 7,000ha would lose access to irrigation water and therefore be unable to produce vegetable crops (NFU, 2010).

Some of these key issues for abstractors are driven by climate change, population demand and demand for water for environmental benefits. These factors contribute to the increasing demand for water and therefore the pressures on abstractors. Currently, in times of less water, the first restrictions to be put in place are those on agricultural abstractors, magnifying the issue of water security (Peter Youngs Pers. Comm. 2013).

Agriculture within the Alde-Ore area allows for significant economic gains however, should there be a reduction in the availability of water for abstraction these economic gains would be rapidly transformed into losses. As well as the decrease in the value of land and outputs from agriculture, there would be knock-on implications for supply chain industries, such as haulage companies, machinery dealers and agricultural contractors, as well as further down the supply chain for supermarkets and customers (Peter Youngs Pers. Comm. 2013). Agriculture in the coastal Suffolk area also provides tourism benefits and makes up 66% of the land area in coastal Suffolk, therefore playing a large part in why tourists visit the area (NFU, 2010).

5.8 Tourism

5.8.1 Tourism in the UK and Suffolk

Tourism in Britain contributed £127 billion towards the economy (in both direct and indirect contributions) and supported 3.12 million jobs in 2013 (Deloitte and Oxford Economics, 2013). The effects of tourism extend to several different sectors, affecting them directly and indirectly throughout the supply chain, such as: accommodation, travel, culture and heritage, and food and drink. This makes tourism an important industry throughout the UK supporting jobs and contributing to other industry sectors.

Tourism in Suffolk is enhanced by the wide range of landscapes, towns and attractions that draw people in from across the UK and further afield. The tourism industry in Suffolk is estimated to be worth £1.084 billion to the economy (Ipswich Borough Council, 2011) and recent statistics published by Visit England show that the Suffolk tourism industry brought in £970 million through spending in 2008 (Visit England, date unknown). Table 5-28 shows the most significant proportion was spent by

domestic day visitors (63%) followed by domestic overnight visitors (27%). Visitors from abroad are also attracted to the county and were estimated to have spent £76 million in 2008, accounting for 8% of the tourism spend.

Table 5-28: Tourism spending by type of tourism (£ millions, 2008) (Visit England, date unknown)						
Area	Inbound Visitors	Domestic overnight visitors	Domestic day visitors	Domestic outbound visitors*	Total	Total (excluding outbound)
Suffolk	£76	£259	£613	£22	£970	£948
	8%	27%	63%	2%	100%	98%
*amount spent in Suffolk by people from the UK going abroad e.g. Taxi to airport						

The Alde-Ore local area lies within the eastern part of the Suffolk Coastal District described as a honeypot tourist area, experiencing high demand at peak times (Suffolk Coastal District Council, date unknown). Visitors are drawn to the area for the well-established leisure activities such as coastal walks and bird watching, the picturesque historic market and seaside towns, as well as the developing gastronomy scene. Figures from Visit England (2012) estimate that 3.71 million people visit the Suffolk Coastal District per annum. These visitors contribute an estimated £67.34 million to the local economy each year.

Tourism feeds into and helps to support several other industries within the local and national economies. Additional spending is usually incurred when visiting a place or area and is not limited to just holidays or overnight stays; Table 5-29 shows that business trips and visiting friends and family generated an estimated average spend of £9 million per year in the Suffolk Coastal area. Some of the sectors that can benefit from tourism through increased spending are:

- Food and drink – tourists and visitors often spend money in a variety of different locations on food and drink including snacks and drinks whilst visiting attractions, meals in local cafes, restaurants, pubs and hotels, food and drink fairs/festivals and when shopping at local supermarkets (particularly for self-catering visitors);
- Accommodation – although the accommodation industry does provide a service to local individuals who need it, the predominant and long-term focus is holidaying and business overnight visitors from outside the area. Accommodation includes hotels, B&Bs, self-catering apartments/cottages, camping/caravan sites and hostels;
- Culture and heritage – this plays a big role in bringing visitors into an area and can range from singular attractions to an overall historical/cultural experience within an area. Examples include art exhibitions, historical homes, seaside/market towns, botanical gardens and performing arts; and
- Travel - this is a key aspect of tourism as it allows individuals to reach and explore the area they are visiting. Key areas of expenditure for travel include the use of trains, buses, taxis, ferries and hire cars. Indirect travel costs can also include fuel and parking fees.

Table 5-29 summarises the results of a survey carried out by Visit England over a three year period (2009-2011). This survey estimated that 297,000 domestic overnight trips were made each year to the Suffolk Coastal District (Visit England, 2011). These overnight trips generated a demand of 901,000 bed nights per year and an estimated total spend of £111 million over the three year period. Holiday trips over the three year period accounted for approximately 51% of total trips, 59% of bed nights and 76% of the spending. As these data are the closest available, the number of overnight trips to the Alde-Ore local area can be estimated by calculating a proportion of the number of visitors to the Suffolk Coastal District based on area. The Alde-Ore local area is just under one third of the total District area, thus the total number of trips were divided by three, giving approximately 100,000 overnight trips when rounded to the nearest thousand. This is likely to be a conservative estimate considering that the Alde-Ore local area contains some of the District's main visitor attractions.

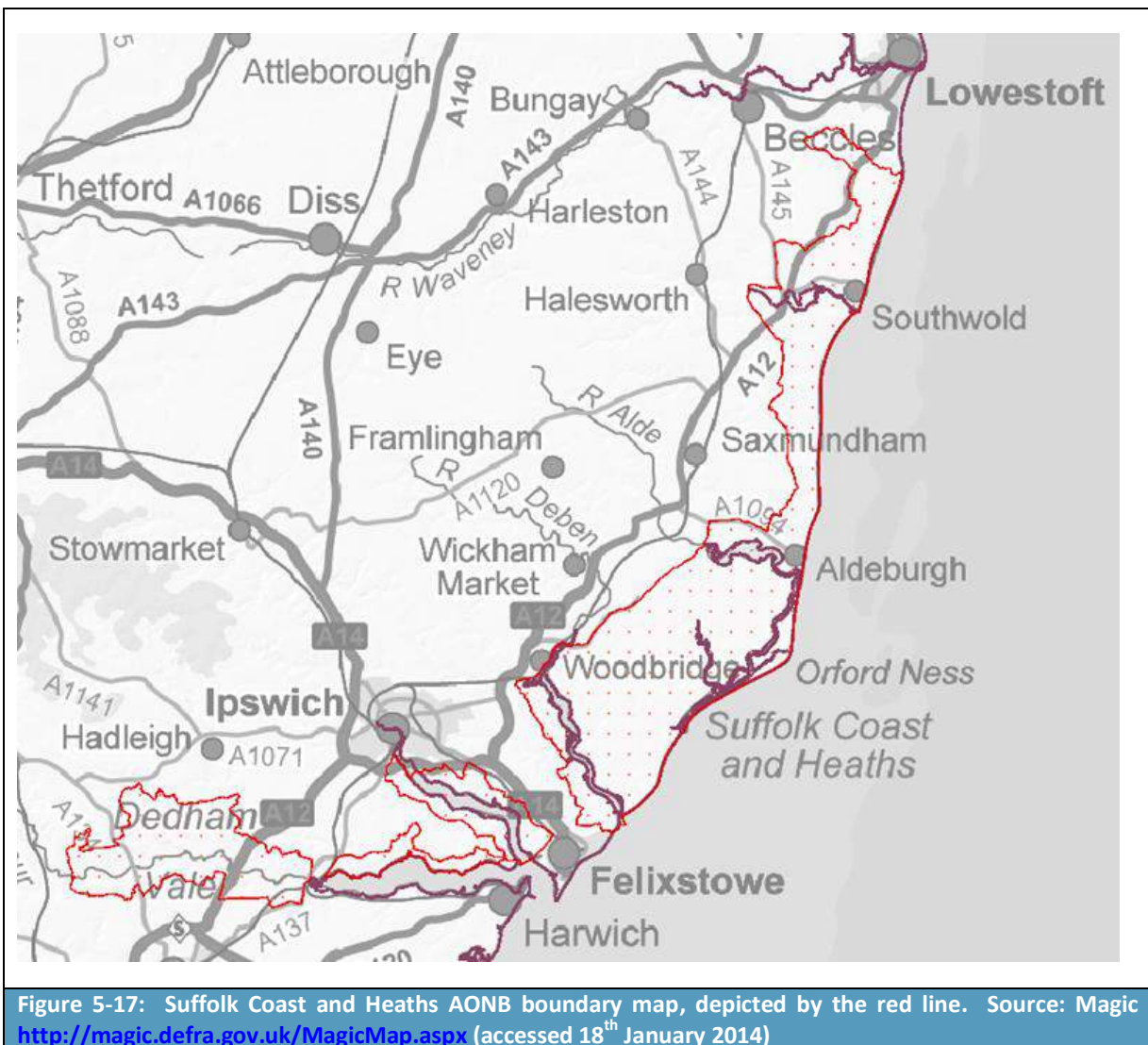
Table 5-29: Annual domestic trip averages to the Suffolk Coastal District from 2009 to 2011 (Visit England, 2011)			
Type of trip	Number of trips	Number of nights	Amount spent
All trips*	297,000	901,000	£37 million
Holiday trips	151,000	533,000	£28 million
Business trips and trips to family and friends	146,000	368,000	£9 million
*All domestic overnight trips include holiday trips, business trips and trips to family and friends			

Many companies and businesses that deliver tourism services and products employ full time, part time and seasonal staff, thus tourism spending goes towards supporting and creating jobs within the tourism industry and its associated sectors such as food and travel. In 2009 there were 5,400 individuals working within the Suffolk Coast tourism industry which represented 11% of all employment within the Suffolk Coast local district; this was slightly above the average for England in 2009 of 10% (Table 5-30; Visit England, date unknown).

Table 5-30: Tourism Employment in the Suffolk Coastal District (2009) (Visit England, date unknown)				
Area	Employees	Full time employees	Part time employees	Employment
Suffolk Coastal District tourism employment	4,800	2,200	2,600	5,400
% of people in employment in Suffolk Coastal District, employed in the tourism trade	11%	7%	18%	11%
Note: Employment and employee figures are different due to working proprietors (i.e. hotel owners who work in the hotel) being included within the employment figure but not the employee figure.				

5.8.2 Suffolk Coast and Heaths AONB

The study area is located within the Suffolk Coast and Heaths Area of Outstanding Natural Beauty (AONB) and heritage coast (see Figure 5.17 for the AONB boundary).



Annually, there are an estimated 1.7 million bed nights available within the AONB delivered by just under 6,000 bed spaces within hotels, B&B's, self-catering facilities and other commercial accommodation (URS, 2013). Additional bed spaces are also available to those staying with friends and family or those with second homes; this is estimated to create a further 55,000 bed nights within the area.

A total of three million people are estimated to visit the AONB each year, generating £233.7 million in direct and indirect spending and supporting 3,600 full time equivalent jobs (URS, 2013). These figures are determined by the number of residents within a two hour drive of the AONB and have been adjusted to include holiday makers within the wider catchment area (such as Ipswich, Lowestoft and Norwich). As these visitor numbers represent the closest overall estimate of the number of visitors to the Alde-Ore local area, it is estimated that the number of day visitors to the Alde-Ore local area is roughly 1 million per year. This is based on the assumption that the Alde-Ore study area is representative of the entire AONB, which would seem reasonable given that it offers a good number of attractions and landscape features. Based on this assumption, it is possible to

calculate visitor numbers by area. As the total area of the AONB is 40,300ha¹⁷, and the approximate area of the Alde-Ore study area is 15,000ha, this gives a figure of just over 1 million visitors per year. These figures must be used with an element of caution due to the assumptions used in the calculations.

5.8.3 Alde-Ore Attractions

In addition to the beaches, rural walks and the picturesque villages, the Alde-Ore local area has several popular visitor attractions. These attractions range from yearly events, cultural and shopping complexes, historic sites and nature reserves (see Table 5-31). Suffolk has a strong reputation for tourism and these attractions are well advertised both locally and nationally through several tourism websites, visitor/information centres and local shops. All the attractions vary in size, admission price and the experience offered; and thus visitor numbers, expenditure and demographics are different for each attraction (see Table 5-32 for number visitor numbers and admission fees for some of the main attractions).

Table 5-31: Visitor attractions within the Alde and Ore local area		
Name of attraction	Type of attraction	Location
The Suffolk Punch Trust	Animal Farm	Hollesley
Orford Castle	Historical site	Orford
Snape Maltings	Shopping and art gallery	Saxmundham
Aldeburgh Music	Cultural	Saxmundham
Rendlesham Forest Centre	Recreation/Nature	Woodbridge
Jubilee Hall	Cultural	Aldeburgh
Aldeburgh Church	Cultural and Historical	Aldeburgh
The Red House	Cultural and Historical	Aldeburgh
Thorpeness Windmill	Historical and recreation/Nature	Thorpeness
Thompson's Gallery	Cultural	Aldeburgh
Dunwich Underwater Exploration	Historical	Orford
Orford Ness	Recreation/Nature	Orford
Lady Florence River Cruises	Recreation/Nature	Orford
Orford Museum	Historical	Orford
Havergate Island	Recreation/Nature	Orford
The Martello Towers	Historical	Aldeburgh
Aldeburgh Mystery Treasure Trail	Recreation	Aldeburgh
Orford Crafts	Cultural/shopping	Orford
Hazlewood marshes	Recreation/Nature	Aldeburgh
Snape Marshes	Recreation/Nature	Snape
Blaxhall common	Recreation/Nature	Saxmundham
Tunstall Forest	Recreation/Nature	Tunstall
Captains Wood	Recreation/Nature	Sudbourne
Sutton and Hollesley Common	Recreation/Nature	Woodbridge
Boyton Marshes	Recreation/Nature	Boyton
Bawdsey Radar	Historical	Bawdsey
Bentwaters Cold War Museum	Historical	Rendlesham
Aldeburgh Food Festival (plus fringe events)	Cultural/Shopping	Aldeburgh and local area
Source: Information taken from www.visit-suffolkcoast.co.uk , www.discoversuffolk.org.uk/ , www.visitengland.com and http://www.visitsuffolk.com on 27 th November 2013		

¹⁷ Landscapes for Life website: <http://www.landscapesforlife.org.uk/suffolk-coast-and-heaths-aonb.html>

Table 5-32: Alde-Ore local area attractions, visitor numbers and admission fees

Name	Numbers of visitors	Admission fee
Bawdsey Radar ^a	1330 (2012)	£4.00 Adults, children free
Orford Ness National Nature Reserve ^b	8,000 (2011)	Member: £4.00 Adult, £2.00 Children, Family £10.00 Non-member: £8.00 Adult, £4.00 Children, Family £20.00
Orford Castle ^a	29410 (2012)	£6.00 Adult, £5.40 Concession, £3.60 Children
Suffolk Punch Trust ^c	10,638 (2013)	Adult: £8.00, Children 5-16: £5.00, Family (2 adults, 3 children): £20.00; Concession: £7.00, Cyclists and walkers: deduct £1, Couple season ticket: £35 per year, Family season ticket (2 adults, up to 3 children): £45 per year, Individual season ticket; £20
Bentwaters Cold War Museum ^a (VE, 2012)	2577 (2012)	£5.00 Adults, £4.00 concession, children free
The Red House - Aldeburgh ^d	3060 (2011)	Free but guided tours are £7.50 for Adults Parking is also £5 June to August
Sources: ^a Visit England (2012a); ^b Figures provided by the reserve via the reserves questionnaire (2013); ^c Visitor numbers provided by the Suffolk Punch Trust via email on 13/12/2013; ^d Visit England (2012b).		

Suffolk Punch Trust

The Suffolk Punch Trust is situated close to Hollesley and approximately 7km from Orford. The Trust's primary focus is the conservation of the native Suffolk punch horse and thus the visitor attraction is mainly centred on the horses. However the attraction has diversified into other areas and currently consists of a working stables and stud, café (independent from Trust), shop, heritage museum, dairy, heritage garden, rare breeds farm/petting farm and circular walks¹⁸. The attraction is open during spring, summer and autumn, closing periodically between seasons, and received a total of 10,638 visitors in 2013¹⁹. In addition to the admission fees, the Suffolk Punch Trust also raises revenue through the sales of merchandise within their onsite shop. In 2013, sales from the shop were nearly £16,500²⁰.

Orford Castle

Orford Castle is situated on the edge of Orford town and was built by Henry II between 1165 and 1173 (Orford Museum, date unknown). The site is now run and maintained by English Heritage²¹ and is a popular attraction within the town, attracting 29,410 visitors in 2012 (Visit England, 2011). Table 5-29 details 2013 admission fee rates to the castle; visitors whom are paid members of English Heritage can visit the site for free. In addition to the castle and gardens, the site also has a merchandise shop which is thought to bring in extra revenue through additional spending.

Snape Maltings & Aldeburgh Music

Snape Maltings²² is a multi-purpose complex providing unique shops, gallery facilities, a pub and restaurants, holiday accommodation, workshops, circular walks, boat trips and a concert hall which plays host to Aldeburgh Music. The complex attracts visitors from both inside and outside of the

¹⁸ Suffolk Punch website: <http://suffolkpunchtrust.org/>

¹⁹ Visitor numbers and onsite shop sales for 2013 were provided by the Suffolk Punch Trust via email on 13/12/2013

²⁰ This total excludes sales from the online shop and sales within the onsite cafe which are owned independently from the Trust

²¹ English Heritage website: <http://www.english-heritage.org.uk/daysout/properties/orford-castle/>

²² Snape Malting website: <http://www.snapemaltings.co.uk/>

local area and it is estimated that Aldeburgh Music²³ attracts around 100,000 visits per year (URS, 2013), with around 40,000 coming from outside the area. Aldeburgh Music is a charity which promotes the advancement and education in the arts and crafts (including music, drama, dancing, painting, sculpture etc.) (Companies House, 2013). The charity is world renowned for its year-round events and productions, with the annual festival being a major visitor attraction. Aldeburgh Music Trading Ltd is a subsidiary of Aldeburgh Music and undertakes the management of sponsorship and other commercial activities of the shop at Snape Maltings Concert Hall, including the hiring of facilities for weddings, conferences and events. All of its taxable profits are donated to Aldeburgh Music under Gift Aid, which in 2013 was £130,500, rising by 26% from £96,000 in 2012 (Companies House, 2013).

Aldeburgh Food and Drink Festival

Aldeburgh Food and Drink Festival is a yearly event which takes place at Snape Maltings for a few weeks between September and October²⁴. The event is centred upon locally produced food and drink and hosts retail stalls, workshops, demonstrations and a conference (2013 conference theme was Food Security for the Nation and for Suffolk). In addition to this several food festival fringe events are also held within the Alde-Ore local area. The 2012 festival attracted 10,000 visitors, 59% of which had travelled up to 1 hour to get to the festival and 41% had travelled over an hour (IQuius Research, 2012). Survey results indicated that 50% of festival visitors were returning visitors and that 44% had only visited the local area due to the festival (this figure is applied to both day and overnight visitors). The total direct spend generated by the 2012 festival alone was £289,717 (this includes £38,665 entrance fees, £18,952 stall holder fees and £232,100 visitor expenditure). In addition, the fringe festival was estimated to have generated a further £29,369 (additional turnover of £683 for 43 businesses). The estimated total net impact of the 2012 festival (including fringe events) was calculated to be £966,000 using the PRIME model and taking into account displaced expenditure; this was estimated to generate 14.4 full time jobs (IQuius Research, 2012).

Orford Ness Nature Reserve

Orford Ness nature reserve is managed by the National Trust and is the largest shingle spit in Europe (National Trust, date unknown). The site contains fragile coastal vegetation and unexploded bombs originating from its previous use as a military experiment site; this means that visitor numbers are restricted to a daily maximum of 156²⁵ and the site can only be accessed by ferry to protect the fragile spit. Visitor numbers are estimated to be between 7,000 and 8,000, with 95% visiting between April and September. Gross annual turnover is estimated to be around £400,000, made up of admission fees and grants such as EU funding. The nature reserve currently spends £140,000 on staff, employing six full-time (soon be cut down to four) and two seasonal employees (full time equivalent).

²³ Aldeburgh Music website: <http://www.aldeburgh.co.uk/>

²⁴ Aldeburgh Food and Drink Festival website: <http://www.aldeburghfoodanddrink.co.uk/>

²⁵ Information provided by Grant Lahoar on 24/10/13

6 Overall Results

The results of the questionnaires, in particular the information on how much people spend, can be used to provide an estimate of the overall value of the estuary in its current condition to home and second homeowners, visitors, sailors and wildfowlers. Other land uses, such as agriculture, also benefit the local economy.

In order to calculate the overall local and tourist spending contribution to the economy of the Alde-Ore local area, several assumptions have been used. It has also been necessary to make adjustments to account for potential double counting between questionnaires.

Expenditure by home and second homeowners within the Alde-Ore local area was adjusted to account for the proportion of spending carried out within the Alde-Ore local area per item and the proportion of respondents who indicated that they spent money on that item. Individual item spend was multiplied by the number of households and the number of second homes within the Alde-Ore local area (7,585 and 964 respectively). This assumes that the respondents to the questionnaires spending patterns and mean spend are representative of the local area population as a whole. The estimated total spend by home and second homeowners respectively is £16 million and £1.6 million per year (Table 6-1).

Visitor spend per party was split into those visiting for the day and those staying overnight to take account of the additional cost of accommodation. Day visitor expenditure per party was multiplied by the estimated number of day visitors to the Alde-Ore local area - 280,000 visits per year. This is based on the number of day visitors to the Suffolk Coast and Heaths AONB (1 million, see section 5.8.2) adjusted by the average party size given by respondents to the questionnaires. Expenditure by visitors staying overnight was multiplied by the estimated number of overnight trips to the Alde-Ore local area (100,000), which is based on the annual domestic trip averages for the Suffolk Coastal District adjusted to account for area (see section 5.8 for assumptions made). The estimated total spend within the Alde-Ore local area by day and overnight visitors is £59 million and £17 million per year respectively (Table 6-1). This assumes that the spending patterns of those who completed questionnaires are representative of all visitors to the Alde-Ore local area.

These figures assume no self-selection, for example, those with a greater interest in the estuary and the recreational opportunities it offers may have been more likely to complete a questionnaire, and thus there is a risk over-estimating spending on certain items, for example specialist equipment.

In order to calculate the total annual spend by yachting and sailing club members it is important to reduce the risk of double counting between club members and residents within the Alde-Ore local area. The number of club members was reduced by mean party size to reduce the risk of double counting across joint memberships, giving 1,394 members. Annual spend by members of yachting and sailing clubs per household was then multiplied by the number of club members, giving £2.2 million. This figure was then adjusted to take account of the proportion of homeowners who had stated that they spend money on specialist equipment (this does not consider spending on membership fees). As 36% of homeowners indicated that they spent money on specialist equipment, the annual total yachting and sailing spend is estimated at £1.4 million per year.

The number of wildfowlers taking part in wildfowling activities in the Alde-Ore local area was assumed to be roughly the number of members belonging to the Alde & Ore Wildfowlers Association (100 members²⁶). This gives an estimated total spend of around £108,000 per year (based on an

²⁶ Alde & Ore Wildfowlers Association website: <http://www.aldeandorewildfowlers.com/history.php>

average annual spend per person of £1,079). However, in order to avoid double counting it was assumed that a proportion of this spending is already captured in the householders' questionnaires. The total spend was therefore adjusted by the proportion of wildfowling who indicated that they live within the Alde-Ore local area (40% of respondents live within the Alde-Ore local area), giving a total wildfowling spend of around £65,000 per year.

Table 6-1: Expenditure within the Alde-Ore local area by user group (to two significant figures to reflect uncertainties)		
User group	Notes and assumptions	Total expenditure per year in £millions
Homeowners	Based on 7,585 households. Total spend adjusted by proportion of spending per item and the number of respondents who indicated spending on each item. Assumes spending patterns and mean spend are representative of all householders within the Alde-Ore local area. Assumes no self-selection to questionnaires	£16
Second homeowners	Based on 964 second homes. Total spend adjusted by proportion of spending per item and the number of respondents who indicated spending on each item. Assumes spending patterns and mean spend are representative of all householders within the Alde-Ore local area. Assumes no self-selection to questionnaires	£1.6
Day visitors	Based on 280,000 visitors (accounting for average respondent party size). Assumes mean spend is representative of all visitors to the area. Assumes no self-selection to questionnaires	£59
Overnight stay visitors	Based on 100,000 overnight trips. Assumes mean spend is representative of all visitors to the area. Assumes no self-selection to questionnaires	£17
Yachting and sailing club members	Based on 1,394 members (adjusted by mean party size) and assuming that 36% of the total spend has already been captured in the homeowners total spend	£1.4
Wildfowling	Based on 100 wildfowling members within the Alde-Ore local area, and assuming that 40% (based on the number of wildfowling who live in the Alde-Ore local area) of the total spend has already been captured within the homeowners total spend. Assumes that the average respondent spend is representative of all club members. Also assumes that the proportion of members living within and those coming from outside the area is representative of all club members.	£0.65
Total expenditure		£96

The results from the questionnaires suggest that the Alde-Ore local area attracts spending in the region of £96 million per year from a range of different user groups. This figure is based on a number of assumptions and should only be used as an indicative estimate. The total includes expenditure from residents, visitors and recreational users of the local area.

Agriculture is also an important land use within the estuary that relies on freshwater being available for irrigation. The current value of agricultural output alone is estimated at £9-£12 million per year²⁷. As well as farming output, there are other considerable economic benefits from employment and supply chain benefits which also extend outside of the local area.

Other businesses in the Alde-Ore local area also play an important role in the local area economy, many of which rely on revenue from tourism and recreation. It is these businesses that will benefit from some of the £96 million spent in the area each year. Employment from the 37 businesses sampled indicates that considerable benefits are supported by businesses in the area and thus the local environment. The extent to which any recognised environmental benefits by business respondents is representative of all of the businesses within the Alde-Ore local area is difficult to assess, as self-selection could be a concern.

The estuary and the environment of the Alde-Ore local area play a significant role in the reasons why residents choose to live in the area and in attracting visitors and recreational users to the area, with attractive environment and scenery being the top reasons given by respondents. Businesses also stated that the environment played an important role in sustaining their business, with 54% stating that the environment was essential to their business and 85% indicating that their business would be affected should recreational river activities no longer be possible, though again it must be recognised that this is based on a relatively small sample size with a high probability of self-selection.

The economic impacts of changes to the management of flood defences may be significant, but this study does not attempt to place a value on the impacts this would have to the local economy. As such, conclusions on the magnitude of changes to the local economy from changes to flood defences cannot be made. However, it does highlight that there are a number of activities which rely on the estuary and the local environment, with residents, visitors and local businesses valuing the landscape characteristics and opportunities they provide.

²⁷ Based on information provided by Peter Youngs from the East Suffolk Water Abstractions Group

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Annex 1 Questionnaires used in the study

A1.1 Householders/Visitors Questionnaire

Alde and Ore Estuaries Householders and Visitor Survey 2013

Your response will help us preserve what you value about the estuary

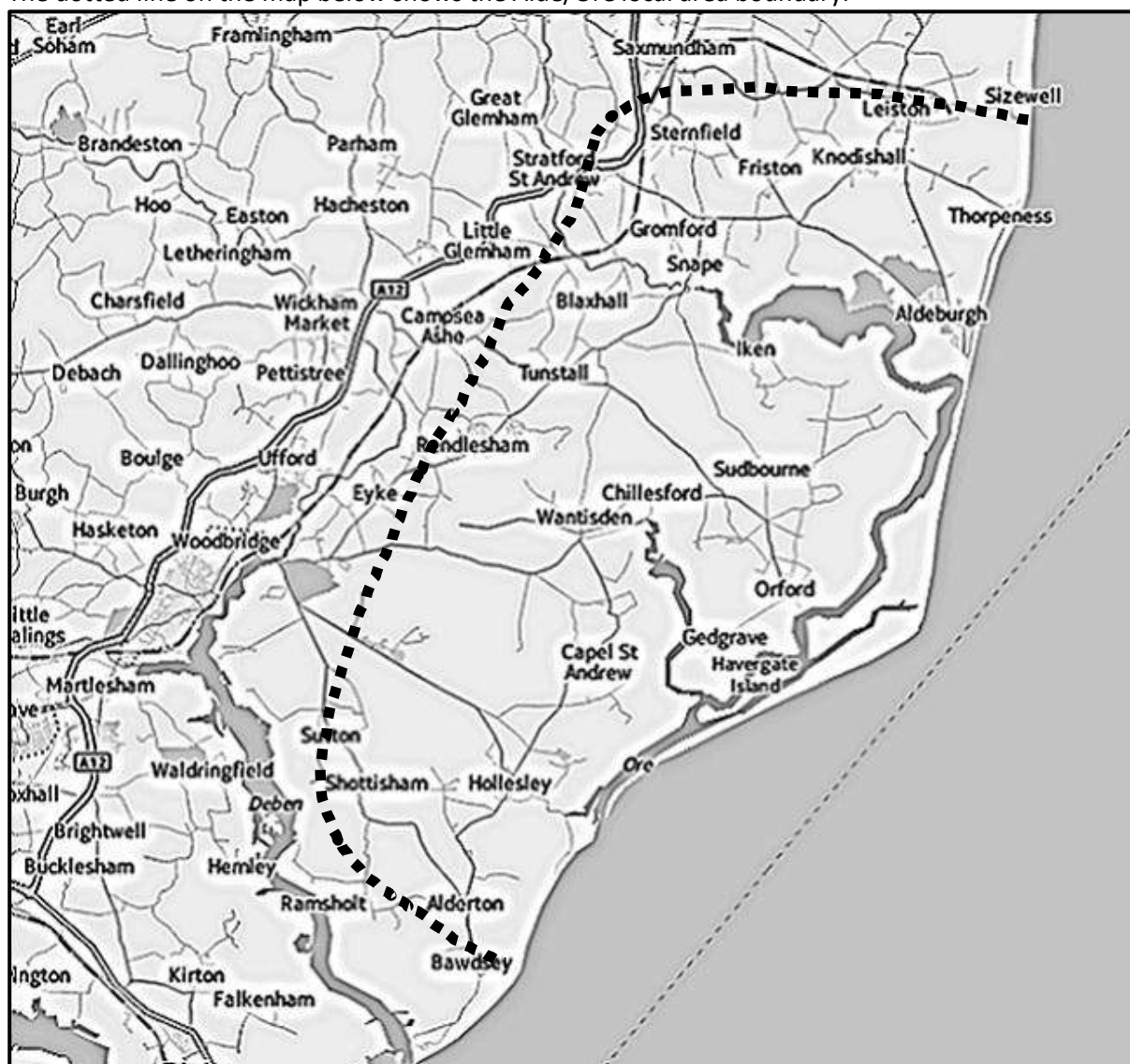
Whether you live and work locally, or just visit the area of the Alde and Ore Estuary, many of the activities you enjoy, such as sailing, walking and fishing, benefit from the flood defences that are currently in place. This depends on keeping the river walls in good repair, but we cannot rely entirely on limited central government funding.

To make the case for funding the flood defences, we need good evidence, and so the Alde and Ore Association is carrying out a study this summer of the economic, leisure and other benefits of the estuary. This questionnaire is an important part of this study.

You can, if you prefer complete this form online - details at the foot of the last page.

Please be assured that your answers will only be used for the purposes of this survey, and will remain confidential.

The dotted line on the map below shows the Alde/Ore local area boundary.



What is your connection to the Alde & Ore Estuary?

- ☐ Resident or Second Homeowner
- ☐ Visitor or non-Alde/Ore resident

Please complete section 1

Please complete section 2

Section One - Alde/Ore Residents & Second Homeowners

1. In what type of accommodation are you based?

☐ Permanent home within the Alde/Ore local area

☐ Second home within the Alde/Ore local area

Other, please specify: _____

2. If you have a second home located within the Alde/Ore local area, could you please indicate on average how many weeks you spend there in a year?

_____ Weeks per year

3. If you have a second home located within the Alde/Ore local area, could you please indicate where your PERMANENT residence is?

County _____ Country _____

Postcode (optional) _____

4. What is the general location of your residence within the Alde/Ore local area?

Nearest town, village or hamlet: _____

5. Which factor/factors influenced your decision to live in the Alde/Ore local area?

(Tick all that apply)

☐ Changed second home into permanent home

☐ Near workplace/former workplace

☐ Previously lived in the area

☐ Moved here after retiring

☐ Attractive environment/scenery

☐ Music/art

☐ Peace and tranquillity

☐ Good schools

☐ Always lived in the area

☐ Family links

☐ Investment in property

☐ Interest in wildlife/bird watching

☐ Activities in the area

☐ Good shopping facilities

☐ Near the beach/coast

Other, please specify: _____

6. What proportion of your shopping do you do WITHIN the Alde/Ore local area?

	Very little (< 25%)	Under half	Over half	Nearly all (> 75%)
Daily essentials (e.g. food, petrol, heating fuel/burning logs)				
Small non-essentials (items typically < £100 e.g. clothes, restaurant meals)				
Moderate/Large non- essentials (items typically > £100 e.g. jewellery, lawnmower)				

7. Please can you indicate how much your household is likely to spend per MONTH WITHIN the Alde/Ore local area on the following? (For SECOND HOMEOWNERS please indicate how much your household would spend in a typical WEEK during your stay in the area)

	Amount to nearest £
Food and drink	
Travel (including petrol and parking)	
Admission fees to attractions	
Concert going	
Gifts/souvenirs	
Antiques/arts/crafts	
Membership fees e.g. clubs	
Vessel storage and mooring	
Specialist equipment/maintenance e.g. sailing, boating, art, golf	
Other, please specify:	

8. Approximately how many times over the past year have you undertaken recreational or leisure activities in the Alde/Ore local area?

☐ Once
 ☐ Twice
 ☐ 3-6 times
 ☐ 7-12 times
 ☐ 13-24 times
 ☐ +24 times

9. How often do you typically undertake the following activities in the Alde/Ore local area annually?

	Once	Twice	3-6 times	7-12 times	13-24 times	+24 times
Sightseeing						
Bird watching						
Walking						
Sailing						
Boat trip						
Motor boating						
Golfing						
Beach visit						
Visit historic sites						
Fishing						
Shopping						
Concert going						
Art/craft courses						
Cycling						
Water skiing						
Shooting/wildfowling						
Riding						
Visit antiques/craft fairs						
Painting						
Hobby photography						
Garden visit						
Other, please specify:						

10. What do you value most about the Alde/Ore local area?

11. Please indicate your age

☐ 16-19
 ☐ 20-29
 ☐ 30-39
 ☐ 40-49
 ☐ 50-59
 ☐ 60-69
 ☐ 70-79
 ☐ 80+

End of section 1 - Please go to the last page of the survey

Section Two - Non Alde/Ore Residents

1. What type of accommodation are you situated in today?

- ☐ Permanent home OUTSIDE the Alde/Ore local area
- ☐ Second home OUTSIDE the Alde/Ore local area
- ☐ Holiday/temporary accommodation INSIDE the Alde/Ore local area
- ☐ Holiday/temporary accommodation OUTSIDE the Alde/Ore local area

2. If located WITHIN the Alde/Ore local area, please indicate your general location?

Nearest town, village or hamlet: _____

3. Could you please indicate where your permanent residence is?

County _____ Country _____

Postcode (optional) _____

4. If located in holiday/temporary accommodation, please could you indicate what type?

- | | |
|--|--|
| <input type="checkbox"/> Bed and Breakfast | <input type="checkbox"/> Hotel |
| <input type="checkbox"/> Boat | <input type="checkbox"/> Pub/Inn |
| <input type="checkbox"/> Camping | <input type="checkbox"/> Self-catering/apartment/villa |
| <input type="checkbox"/> Fixed caravan | <input type="checkbox"/> Staying with friends |
| <input type="checkbox"/> Hostel | <input type="checkbox"/> Towed caravan |

Other, please specify: _____

5. How long are you staying in the Alde/Ore local area?

- | | |
|--|--|
| <input type="checkbox"/> 1 day (not overnight) | <input type="checkbox"/> 3 – 7 nights |
| <input type="checkbox"/> 1 – 2 nights | <input type="checkbox"/> Over 7 nights |

6. On average, how often do you visit the Alde/Ore local area annually?

- | | |
|---|--|
| <input type="checkbox"/> This is a one off trip | <input type="checkbox"/> Often (9-12 times) |
| <input type="checkbox"/> Not very often (2-4 times) | <input type="checkbox"/> Very often (more than 12 times) |
| <input type="checkbox"/> Fairly often (5-8 times) | |

7. Which of the following factors influenced your decision to visit the Alde/Ore local area?

(Tick all that apply)

- | | |
|---|---|
| <input type="checkbox"/> Scenery/landscape | <input type="checkbox"/> Business trip |
| <input type="checkbox"/> Birds/wildlife/nature reserves | <input type="checkbox"/> Beaches |
| <input type="checkbox"/> Snape Maltings | <input type="checkbox"/> Aldeburgh shopping/sightseeing |
| <input type="checkbox"/> Shopping/sightseeing | <input type="checkbox"/> Friends/relatives |
| <input type="checkbox"/> Orford town | <input type="checkbox"/> Sporting event e.g. regatta |
| <input type="checkbox"/> Antiques | <input type="checkbox"/> Place of employment/education |

8. How many people are accompanying you today?

Adult (18+): _____

Children: _____

9. How did you travel to the Alde/Ore local area today? (tick all that apply)

☐ Already in the area

☐ Bicycle

☐ Boat

☐ On foot

☐ Car

☐ Coach

☐ Bus

☐ Motorbike

☐ Taxi

10. How long did it take you to travel to the Alde/Ore local area today?

☐ <20 minutes

☐ 20-39 minutes

☐ 40-59 minutes

☐ >60 minutes

11. How many times have you or do you intend to undertake the following activities WITHIN the Alde/Ore local area?

	Once	Twice	3-6 times	7+ times
Sightseeing				
Bird watching				
Walking				
Sailing				
Boat trip				
Motor boating				
Golfing				
Beach visit				
Visit historic sites				
Fishing				
Shopping				
Concert going				
Art/craft courses				
Cycling				
Water skiing				
Shooting/wild fowling				
Riding				
Visit antiques/craft fairs				
Painting				
Hobby photography				
Garden visit				
Other, please specify:				

12. Can you indicate how much your party has spent or is likely to spend WITHIN the Alde/Ore area TODAY on the following?

	Amount to nearest £
Accommodation (amount per night)	
Food and drink	
Travel (including petrol and parking)	
Admission fees to attractions	
Concert	
Gifts/souvenirs	
Antiques/arts/crafts	
Clothing	
Golf	
Specialist equipment e.g. boating, art, golf, birding	
Other, please specify:	

12. What do you value most about the Alde/Ore local area?

13. Please indicate your age

☐ 16-19
 ☐ 20-29
 ☐ 30-39
 ☐ 40-49
 ☐ 50-59
 ☐ 60-69
 ☐ 70-79
 ☐ 80+

End of section 2- Please go to the last page of the survey

Thank you very much for your time

If you would like to receive information regarding the outputs of this study and other Alde/Ore estuary matters, please provide your email address (*please be assured your email address will not be shared with any other associations, groups or third parties*):

Email address:.....

Please return your questionnaire to any of the following:

Aldeburgh High Street: Salters Family Butchers
The Aldeburgh Post Office
Tourist Information Centre

Orford: Friends Garage
Orford General Stores

Snape: Aldeburgh Music Shop and Box Office

Please check the Alde and Ore Association website for other collection points and further information - www.aldeandore.org

Alde and Ore Association contact email: Andrewmcd01@btinternet.com

In order to capture a variety of users, we have developed different surveys. You are welcome to complete more than one of these, but please could you indicate if you have already completed any of the following in addition to this survey:

☐ Yachting/Sailing Club

☐ Wildfowler's

☐ Business

If you prefer, this survey can be completed on Survey Monkey at the following address below or alternatively by scanning the QR code:

<https://www.surveymonkey.com/s/AldeAndOreHouseholdersAndVisitorsSurvey2013>



THE ALDE & ORE ASSOCIATION
Maintain our Coast and River Defences



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Risk & Policy Analysts

A1.2 Yachting and Sailing Questionnaire

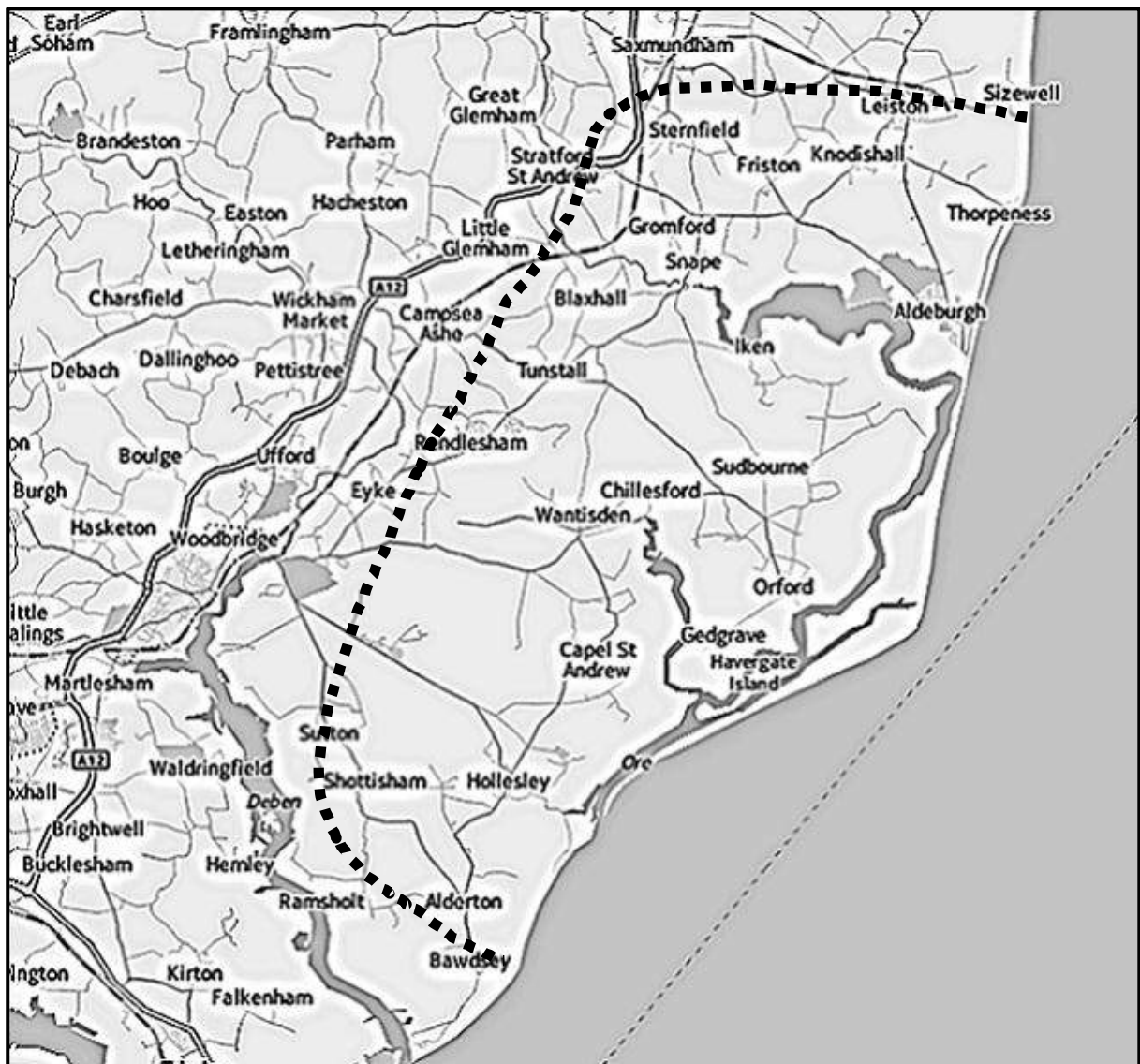
Alde and Ore Estuaries Yachting and Sailing Club Survey 2013

Your response will help us preserve what you value about the estuary

Sailing and the other water activities which take place on the river can only do so because of the shape of the estuary. Keeping the estuary walls upgraded and maintained will help safeguard river activities for years to come as well as the beautiful environment and the tourism on which this area depends. To make the case for funding to keep the walls maintained, either from national or local sources, good evidence is needed. This survey is a critical part of a study being carried out by the Alde and Ore Association to identify and quantify the local economic benefits of our estuary environment. The results of the survey will be used by the Alde and Ore Estuary Partnership as evidence to support their programme of bids for funding to maintain the protection of the river defences, which in turn are essential to preserve the local environment and local businesses that depend upon it. We would be very grateful for your time in answering these questions.

Please be assured that your answers will only be used for the purposes of this survey, and will remain confidential

You can, if you prefer complete this form online - details at the foot of the last page.



The area within the dashed line on the map shows the area that is considered to be the Alde/Ore local area

1. **Are you and/or your family a member of any of the following clubs?**
- ☐ Aldeburgh Yacht Club ☐ Any other club
- ☐ Slaughden Sailing Club ☐ Not a club member
- ☐ Orford Sailing Club
2. **Do you hold an individual or family/group club membership?**
- ☐ Individual ☐ Family/Group
3. **If part of a family/group membership, how many adults and children are included?**
- Adults (18+) _____
- Children 12-18 years _____
- Children under 12 years _____
4. **Do you or your family/group own any of the following? Tick all that apply**
- ☐ Dinghy ☐ Sailboard ☐ Yacht (keel boat) ☐ Motor cruiser
- ☐ Other - please specify: _____
5. **Where is your boat moored?** _____
6. **Where do you normally stay when involved in yachting and/or sailing activities in the Alde/Ore local area?** (There is a map above showing the Alde/Ore local area boundaries):
- ☐ Home WITHIN the Alde/Ore local area
- ☐ Second home WITHIN the Alde/Ore local area
- ☐ Holiday accommodation WITHIN the Alde/Ore local area
- ☐ Home/Second home/ Holiday accommodation OUTSIDE the Alde/Ore local area
- ☐ Other - please specify: _____
7. **Which of the following river-based or open-sea activities do you regularly (6+ times in a year) take part in?** (Tick all that apply)
- ☐ Yachting (local area) ☐ Water skiing
- ☐ Dinghy sailing (local area) ☐ Jet skiing
- ☐ Motor cruising (local area) ☐ Regattas/open meetings
- ☐ Yachting (open sea) ☐ Wind surfing
- ☐ Dinghy sailing (open sea) ☐ Training courses
- ☐ Motor cruising (open sea) ☐ Fishing trips
8. **Do you consider any of the following an advantage for sailing in the Alde/Ore area?**
(Tick all that apply)

Variety of waters	
Challenge of sailing here	
Ease of sailing here	
Safe waters	
Ease of access to the sea	
Yacht/sailing club facilities	
Regattas/open meetings	
Boatyard repair/maintenance	
Attractive environment	
Training courses	
Access to other coastal sailing areas	
Available anchorages/moorings	
Visit local towns/villages	
Restaurants/pubs in area	
Other (please specify)	

9. Approximately how many days a year do you spend sailing in the Alde/Ore local area?

Days

10. Can you indicate how much your household is likely to spend over an average YEAR WITHIN the Alde/Ore local area on the following whilst partaking in sailing activities?

	Amount to nearest £
Petrol/diesel fuel	
Vessel maintenance – regular/annual	
Vessel repairs – exceptional	
Moorings	
Winter storage	
Membership fees – clubs	
Chandlery items	
Training courses	
Entry fees – regattas/open meetings	
Sailing licenses	
Landing/docking fees	
Specialist clothing	
Specialist sailing equipment	
Food and drink	
Other, please specify:	

11. How often do you undertake the following activities in the Alde/Ore local area in an average year? (Please tick the appropriate boxes)

	Once	Twice	3-6 times	7-12 times	13-24 times	+24 times
Sightseeing						
Bird watching						
Walking (countryside/coastal)						
Sailing						
Boat trip						
Motor boating						
Golfing						
Beach visit						
Visit historic sites						
Fishing						
Shopping						
Concert going						
Art/craft courses						
Cycling						
Water skiing						
Shooting/wild fowling						
Riding						
Visit antiques/craft fairs						
Painting						
Hobby photography						
Garden visit						
Other, please specify:						

12. Please indicate your age by ticking the appropriate range below

☐ 16-19 ☐ 20-29 ☐ 30-39 ☐ 40-49 ☐ 50-59 ☐ 60-69 ☐ 70-79 ☐ 80+

12. What do you value most about the Alde/Ore local area?

Thank you very much for your time

If you would like to receive information regarding the outputs of this study and other Alde/Ore estuary matters, please provide you email address (*please be assured your email address will not be shared with any other associations, groups or third parties*):

Email address:

Please return your questionnaire to any of the following:

Aldeburgh High Street: Salters Family Butchers
The Aldeburgh Post Office
Tourist Information Centre

Orford: Friends Garage
Orford General Stores

Snape: Aldeburgh Music Shop and Box Office

Please check the Alde and Ore Association website for other collection points and further information - www.aldeandore.org

Alde and Ore Association contact email: Andrewmcd01@btinternet.com

In order to capture a variety of users, we have developed different surveys. You are welcome to complete more than one of these, but please could you indicate if you have already completed any of the following in addition to this survey:

☐ Householder/Visitor

☐ Wildfowler's

☐ Business

If you prefer, this survey can be completed on Survey Monkey at the following address below or by scanning the QR code: www.surveymonkey.com/s/AldeAndOreYachtingAndSailingSurvey2013



THE ALDE & ORE ASSOCIATION
Maintain our Coast and River Defences



RPA
Risk & Policy Analysts

A1.3 Wildfowlers Questionnaire

Alde and Ore Estuaries Wildfowlers' Survey 2013

Your response will help us preserve what you value about the estuary

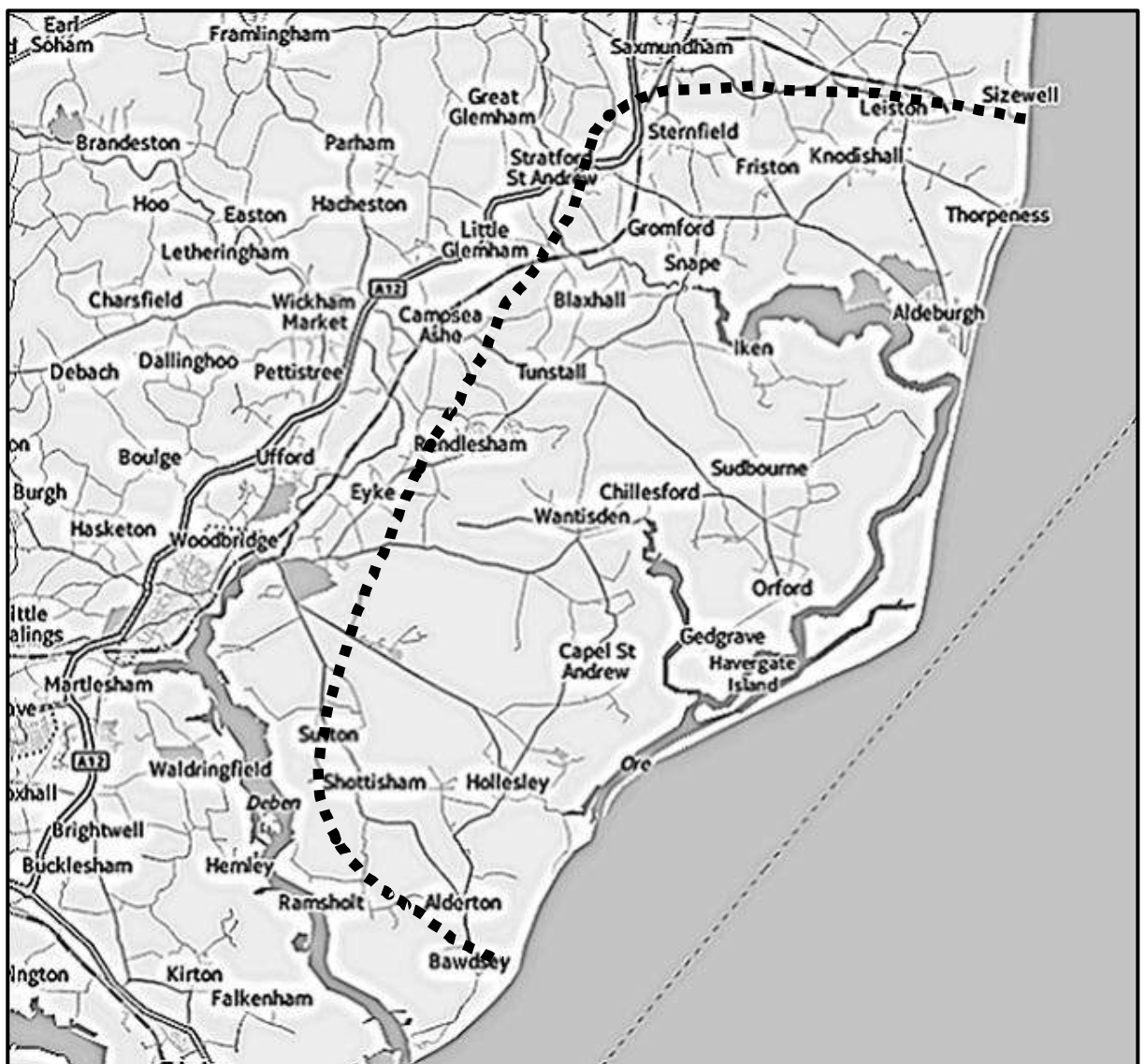
Whether you live and work locally, or just visit the area of the Alde and Ore Estuary, many of the activities you enjoy, such as wildfowling, benefit from the flood defences that are currently in place. This depends on keeping the river walls in good repair, but we cannot rely entirely on limited central government funding.

To make the case for funding the flood defences, we need good evidence, and so the Alde and Ore Association is carrying out a study this summer of the economic, leisure and other benefits of the estuary. This questionnaire is an important part of this study.

Please be assured that your answers will only be used for the purposes of this survey, and will remain confidential

You can, if you prefer complete this form online - details at the foot of the last page.

The area within the dashed line on the map shows the area considered to be the Alde/Ore local area



1. What type of Alde & Ore Wildfowler's Association club membership do you currently have?
☐ Full ☐ Associate ☐ Student ☐ Junior
2. Where do you normally stay when involved in wildfowling activities **WITHIN** the Alde/Ore local area? (There is a map above showing the Alde/Ore local area boundaries)
☐ Home **INSIDE** the Alde/Ore local area
☐ Second home **INSIDE** the Alde/Ore local area
☐ Home/second home **OUTSIDE** the Alde/Ore local area
☐ Holiday accommodation **INSIDE** the Alde/Ore local area
☐ Holiday accommodation **OUTSIDE** the Alde/Ore local area
☐ Other, please specify: _____
3. When taking part in wildfowling activities, in what accommodation are you normally based? (Tick ALL that apply)
☐ Main home/second home **INSIDE** the Alde/Ore area
☐ Main home/second home **OUTSIDE** the Alde/Ore area
☐ Hotel
☐ Pub/Inn
☐ Bed and Breakfast
☐ Self-catering flat/apartment/house/villa
☐ Fixed Caravan
☐ Towed Caravan
☐ Camping
☐ Hostel
☐ Staying with friends/relatives
☐ Boat
☐ Other, please specify: _____
4. Can you indicate how much you are likely to spend over an average YEAR **WITHIN** the Alde/Ore local area on the following whilst participating in wildfowling activities?

	Amount to nearest £
Petrol/diesel fuel	
Shotgun licence	
Gundog care/food	
Specialist clothing	
Training courses	
Binoculars/scopes	
Specialist wildfowling equipment (shotguns, decoys, cartridges etc.)	
Wildfowling literature (books/magazines)	
Vessel maintenance – regular/annual	
Vessel repairs – exceptional	
Moorings	
Food and drink	
Other, please specify:	

5. Approximately how many days a year do you spend taking part in wildfowling activities **WITHIN** the Alde/Ore area?

_____ Days

6. Do you or your family/group own a boat/craft for wildfowling?

☐ Yes ☐ No

7. How often do you undertake the following activities **WITHIN** the Alde/Ore area in an average year? (Please tick the appropriate boxes)

	Once	Twice	3-6 times	7-12 times	13-24 times	+24 times
Sightseeing						
Bird watching						
Walking (countryside/coastal)						
Sailing						
Boat trip						
Motor boating						
Golfing						
Beach visit						
Visit historic sites						
Fishing						
Shopping						
Concert going						
Art/craft courses						
Cycling						
Water skiing						
Riding						
Visit antiques/craft fairs						
Painting						
Hobby photography						
Garden visit						
Other, please specify:						

8. Please indicate your age by ticking one of the ranges below

☐ 16-19 ☐ 20-29 ☐ 30-39 ☐ 40-49 ☐ 50-59 ☐ 60-69 ☐ 70-79 ☐ 80+

9. What do you value most about the Alde/Ore local area?

--

Thank you very much for your time

If you would like to receive information regarding the outputs of this study and other Alde/Ore estuary matters, please provide your email address (*please be assured your email address will not be shared with any other associations, groups or third parties*):

Email address:

Please return your questionnaire to any of the following:

Aldeburgh High Street: Salters Family Butchers
The Aldeburgh Post Office
Tourist Information Centre

Orford: Friends Garage
Orford General Stores

Snape: Aldeburgh Music Shop and Box Office

Please check the Alde and Ore Association website for other collection points and further information - www.aldeandore.org

Alde and Ore Association contact email: Andrewmcd01@btinternet.com

In order to capture a variety of users, we have developed different surveys. You are welcome to complete more than one of these, but please could you indicate if you have already completed any of the following in addition to this survey:

☐ Yachting/Sailing Club

☐ Householders/Visitors

☐ Business

If you prefer, this survey can be completed on Survey Monkey at the following address below or alternatively by scanning the QR code:

www.surveymonkey.com/s/AldeAndOreWildfowlersSurvey2013



THE ALDE & ORE ASSOCIATION
Maintain our Coast and River Defences



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A1.4 Businesses Questionnaire

Alde and Ore Estuaries Business Survey 2013

Your response will help us preserve what value about the estuary

This business survey is a critical part of a study being carried out by the Alde and Ore Association to identify and quantify the local economic benefits of our estuary environment. The results of the survey will be used by the Alde and Ore Estuary Partnership as evidence to support their programme of bids for funding to maintain the protection of the river defences, which in turn are essential to preserve the local environment and local businesses that depend upon it.

You can, if you prefer complete this form online - details at the foot of the last page.

1. Business name

2. Type of business e.g. retail, accommodation, manufacturing, etc.

3. What type of business are you?

- | | |
|--|--|
| <input type="checkbox"/> Public Limited Company (plc) | <input type="checkbox"/> Limited Liability |
| <input type="checkbox"/> Private Limited Company (Ltd) | <input type="checkbox"/> Cooperative |
| <input type="checkbox"/> Partnership | <input type="checkbox"/> Charity/trust |
| <input type="checkbox"/> Sole trader/Proprietorship | <input type="checkbox"/> Franchise |
| <input type="checkbox"/> Unlimited Liability | <input type="checkbox"/> Other |

4. Please indicate how many staff you employ in an average year

Full time	Part time	Seasonal (FTE*)	Volunteer (FTE*)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

5. What (roughly) is your total cost of wages as a percentage of your gross annual turnover?

 %

6. Please can you indicate your gross annual turnover?

- ☐ Less than £100,000 ☐ £100-250,000 ☐ £250-500,000 ☐ £500,000-£1 m ☐ Over £1 m

7. How important do you consider the quality of the local environment to be to your business?

- | | |
|---|---|
| <input type="checkbox"/> Neither important or not important | <input type="checkbox"/> Important |
| <input type="checkbox"/> Not important | <input type="checkbox"/> Very important |
| <input type="checkbox"/> Reasonably important | <input type="checkbox"/> Essential |

8. Can you estimate as a percentage, how much the local environment contributes to your business? i.e. the estuary as it provides for many activities such as sailing, fishing, tourism etc.

- ☐ Zero ☐ Low 1-25% ☐ Med 25-50% ☐ High 50-100%

* FTE = Full Time Equivalent

9. If river activities were no longer possible, and visitor numbers declined, would this affect your business?

☐ Yes

☐ No

Additional comment

10. What proportion of your gross annual turnover occurs during the following months? (please indicate as a percentage)

April – September

%

October – March

%

11. Which activities do you consider contribute to your business and by how much?

	No contribution	Low 1-25%	Medium 25-50%	High 50-100%
Art/craft courses				
Beach visit				
Bird watching				
Boat trip				
Concert going				
Cycling				
Fishing				
Garden visit				
Golfing				
Hobby photography				
Motor boating				
Painting				
Riding				
Sailing				
Shooting/wild fowling				
Shopping				
Sightseeing				
Visit antiques/craft fairs				
Visit historic sites				
Walking (countryside/coastal)				
Water skiing				
Other, please specify:				

12. What do you value most about the Alde/Ore local area?

Thank you very much for your time

If you would like to receive information regarding the outputs of this study and other Alde/Ore estuary matters, please provide your email address (*please be assured your email address will not be shared with any other associations, groups or third parties*):

Email address:

Please return your questionnaire to any of the following:

Aldeburgh High Street: Salters Family Butchers
The Aldeburgh Post Office
Tourist Information Centre

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Orford General Stores

Snape: Aldeburgh Music Shop and Box Office

Please check the Alde and Ore Association website for other collection points and further information - www.aldeandore.org

Alde and Ore Association contact email: Andrewmcd01@btinternet.com

In order to capture a variety of users, we have developed different surveys. You are welcome to complete more than one of these, but please could you indicate if you have already completed any of the following in addition to this survey:

☐ Yachting/Sailing Club ☐ Wildfowler's ☐ Householder/Visitor

If you prefer, this survey can be completed on Survey Monkey at the following address below or by scanning the QR code: www.surveymonkey.com/s/AldeAndOreBusinessSurvey2013



THE ALDE & ORE ASSOCIATION
Maintain our Coast and River Defences



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Risk & Policy Analysts

A1.5 Reserves Questionnaire

Alde and Ore Estuaries Reserves/Protected Areas Survey 2013

Your response will help us preserve what you value about the estuary

This survey is a critical part of a study being carried out by the Alde and Ore Association to identify and quantify the local economic benefits of the estuary environment. The results of the survey will be used by the Alde and Ore Estuary Partnership as evidence to support their programme of bids for funding to maintain the protection of the river defences, which in turn are essential to preserve the local environment and local businesses that depend upon it. We would be very grateful for your time in answering these questions.

You can, if you prefer complete this form online - details at the foot of the last page.

1. Name of reserve/protected area

2. Type of reserve/protected area e.g. wildlife, historic monument

- | | |
|---|--|
| <input type="checkbox"/> Area of Outstanding Natural Beauty | <input type="checkbox"/> National Nature Reserve |
| <input type="checkbox"/> Country Park | <input type="checkbox"/> Ramsar |
| <input type="checkbox"/> Designated Woodland | <input type="checkbox"/> Site of Special Scientific Interest |
| <input type="checkbox"/> Heritage Coast | <input type="checkbox"/> Special Area of Conservation |
| <input type="checkbox"/> Local Nature Reserve | <input type="checkbox"/> Special Protection Area |
| <input type="checkbox"/> Long Distance Trail | |

Other, please specify: _____

3. What time of year is the reserve/protected area open?

4. Please indicate the number of visitors who use the reserve/protected area annually?

5. What proportion of your visitors use the reserve/protected area during the following months? (please indicate as a percentage)

<input type="text"/> %	April – September	<input type="text"/> %	October – March
------------------------	-------------------	------------------------	-----------------

6. Are there any agricultural tenancies in the reserve/protected area?

☐ Yes ☐ No

If Yes, please briefly describe the tenancy and the activities that occur within it:

7. How many staff do you employ in an average year? Please enter seasonal and volunteer workers in full-time equivalents.

☐ Full-time ☐ Part-time ☐ Seasonal (FTE^{*}) ☐ Volunteer (FTE^{*})

^{*} FTE = Full Time Equivalent

8. How important is the quality of the local environment for attracting visitors to your reserve/protected area?

☐ Not important ☐ Reasonably important ☐ Important ☐ Very important ☐ Essential

9. Please can you indicate your gross annual turnover?

☐ <£100,000 ☐ £100-250,000 ☐ £250-500,000 ☐ £500,000-1 m ☐ >£1 m

10. What do you value most about the Alde/Ore local area?

Thank you very much for your time

If you would like to receive information regarding the outputs of this study and other Alde/Ore estuary matters, please provide your email address (*please be assured your email address will not be shared with any other associations, groups or third parties*):

Email address:

Please return your questionnaire to any of the following:

Aldeburgh High Street: Salters Family Butchers
The Aldeburgh Post Office
Tourist Information Centre

Orford: Friends Garage
Orford General Stores

Snape: Aldeburgh Music Shop and Box Office

Please check the Alde and Ore Association website for other collection points and further information - www.aldeandore.org

Alde and Ore Association contact email: Andrewmcd01@btinternet.com

In order to capture a variety of users, we have developed different surveys. You are welcome to complete more than one of these, but please could you indicate if you have already completed any of the following in addition to this survey:

☐ Yachting/Sailing Club ☐ Wildfowler's ☐ Householder/Visitor ☐ Businesses

If you prefer, this survey can be completed on Survey Monkey at the following address:
www.surveymonkey.com/s/AldeAndOreReservesSurvey2013

THE ALDE & ORE ASSOCIATION
Maintain our Coast and River Defences

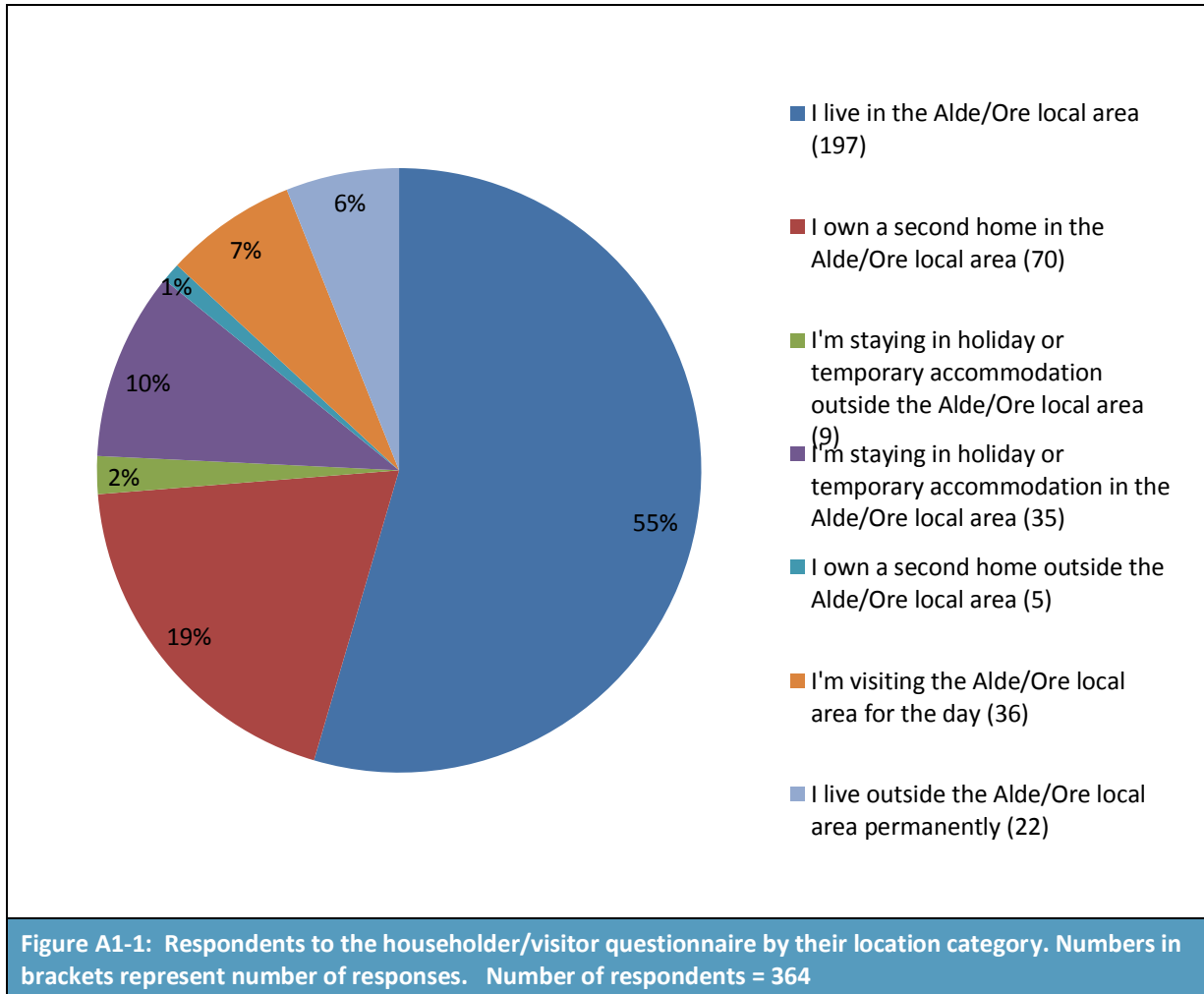


RPA
Risk & Policy Analysts

Annex 2 Householders/Visitors Questionnaire Analysis

A2.1 Householders

Question 1: Which of the following best describes your current situation?



Question 2: What is the general location of your home?

Table A1-1: Location of homeowners in the Alde-Ore local area. Number of respondents = 169		
Factor	Number of respondents	Percentage of individuals
Aldeburgh	82	49%
Aldringham Cum Thorpe	6	4%
Benhall	1	1%
Blaxhall	3	2%
Boyton	0	0%
Butley	1	1%
Capel St Andrew	0	0%
Chillesford	2	1%
Farnham	3	2%
Friston	2	1%
Gedgrave	1	1%
Hollesley	0	0%
Iken	5	3%
Orford	30	18%
Snape	5	3%
Sternfield	0	0%
Sudbourne	6	4%
Tunstall	2	1%
Wantisden	0	0%
Other	20	12%
Number of respondents	169	

Question 3: What factor/factors influenced your decision to live in the Alde-Ore local area?

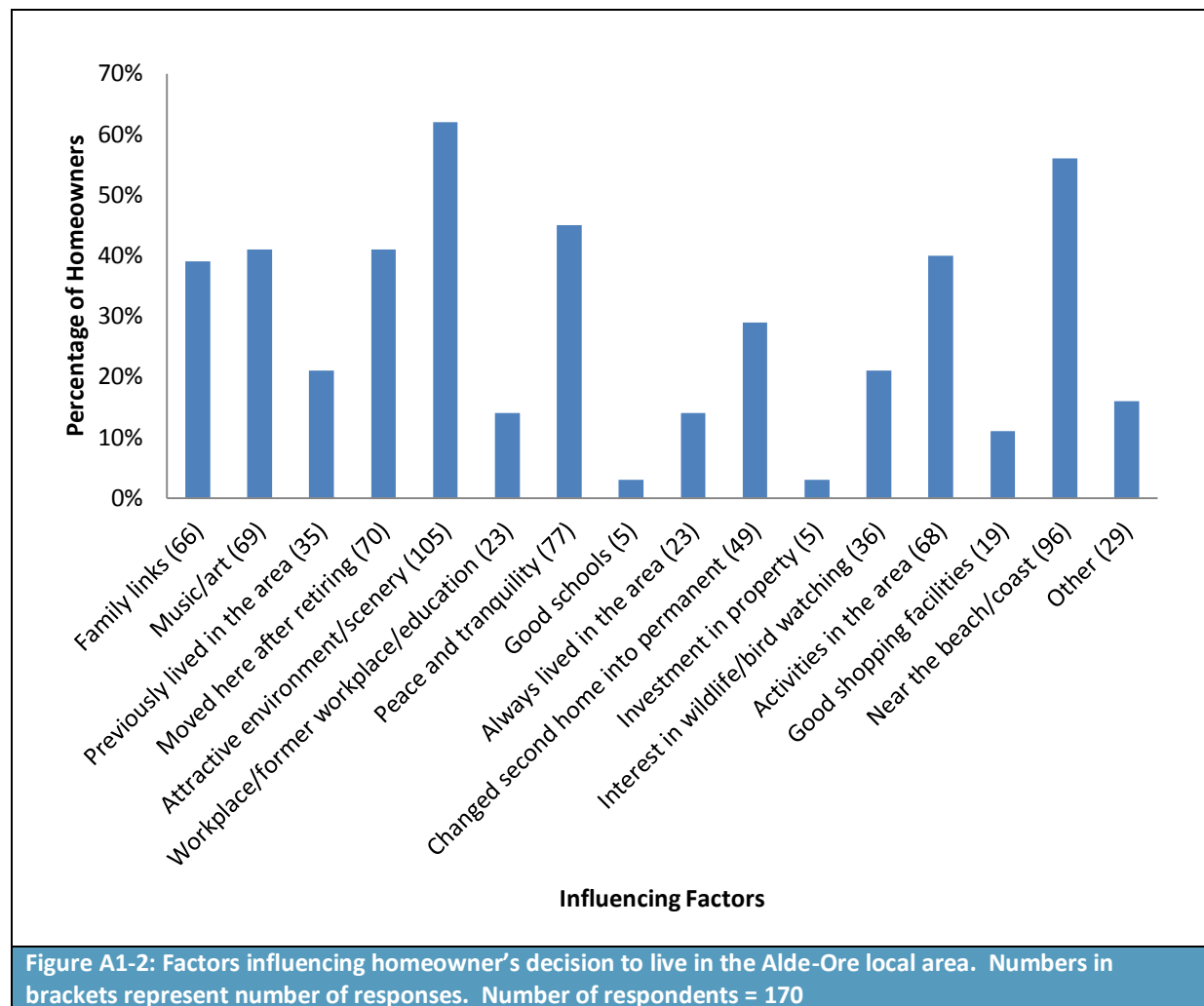
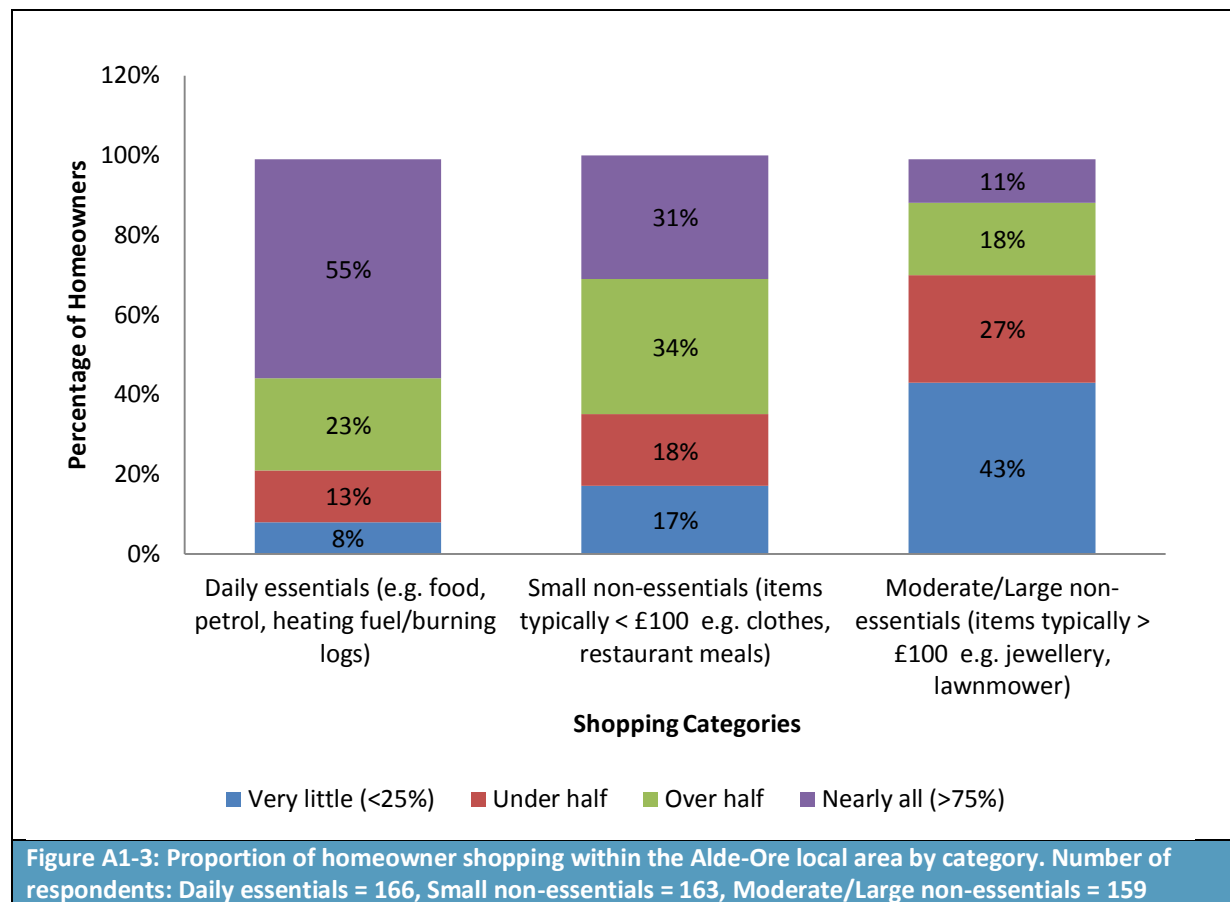


Table A1-2: 'Other' factors influencing homeowner's decision to live in the Alde-Ore local area. Number of respondents = 29		
Other Factor	Number of responses	Percentage of "other" responses
Sailing/River amenities	8	25%
Golf	2	6%
Specific Location Amenities	4	13%
Born here/always lived here	4	13%
Business/job in area	5	16%
Equine activities/amenities	1	3%
Holidayed here previous	3	9%
Family/friends links	5	16%
Total responses	32	-

Question 4: What proportion of the following shopping do you do in the Alde-Ore local area?



Additional comments:

- We all deal with local suppliers for almost all our needs'
- Note Waitrose is in Saxmundham just outside the area!!
- I shop in Wickham Market, Leiston and Woodbridge for the most part
- i.e. in E Suffolk area
- Collective oil supplier would be good
- Shop mainly in Saxmundham owing to minimal parking in Aldeburgh and high prices at Co-op

Question 5: Please can you indicate how much your household is likely to spend in a typical MONTH in the Alde-Ore area on the following? (To the nearest £)

Table A1-3: Homeowners typical monthly household spend in the Alde-Ore local area				
Category	Number of respondents	Mean	Minimum	Maximum
Admission fees into attractions	68	£28.13	£0.00	£350.00
Antiques/arts/crafts	55	£54.53	£0.00	£1,000.00
Concert going	95	£42.09	£0.00	£400.00
Food and drink	131	£287.48	£5.00	£1,250.00
Gifts/souvenirs	68	£30.84	£0.00	£400.00
Membership fees e.g. clubs	93	£110.31	£0.00	£2,500.00
Specialist equipment/maintenance e.g. sailing, boating, art, golf	56	£78.00	£0.00	£600.00
Travel (petrol and parking)	125	£124.75	£0.00	£1,000.00
Vessel storage and mooring	52	£89.19	£0.00	£700.00
Other	40	-	-	-

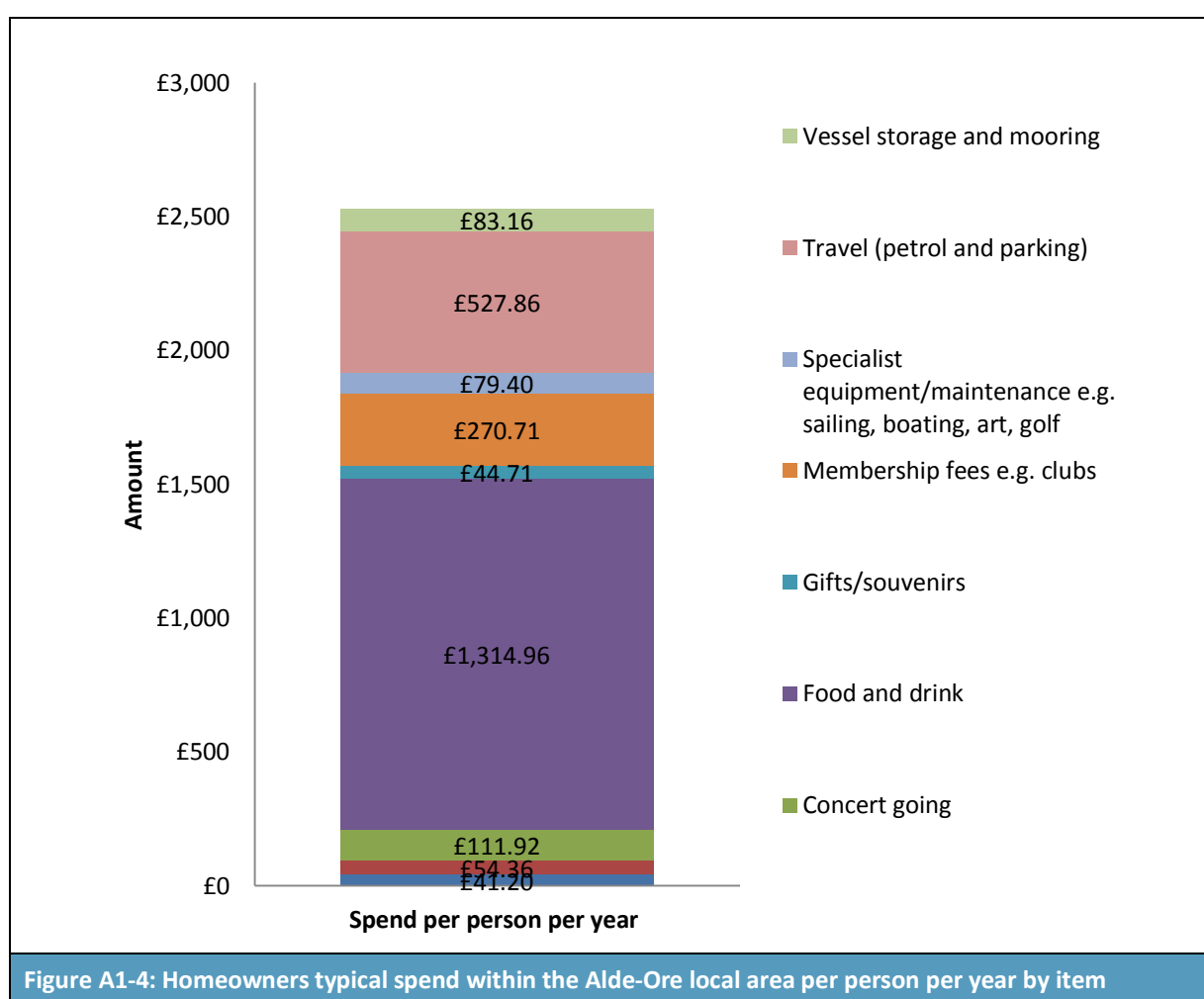
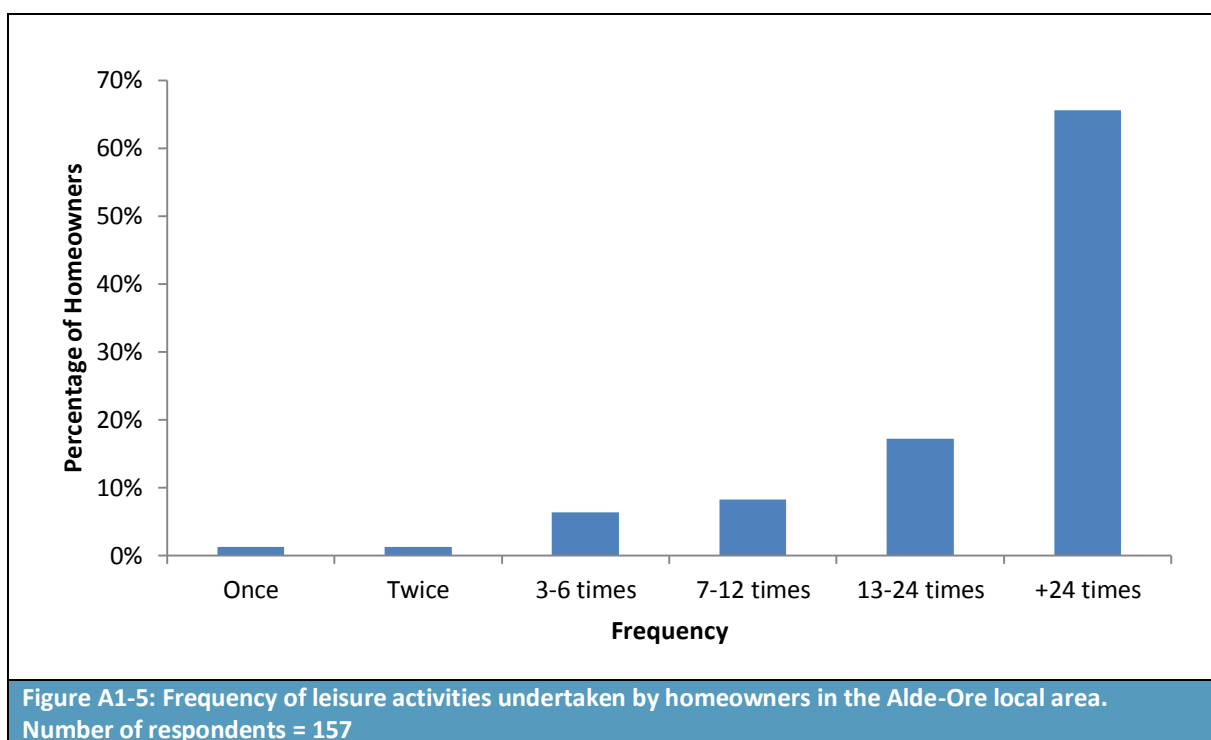


Table A1-4: Homeowners “other” typical monthly household spend in the Alde- Ore local area

Category	Amount spent in Alde-Ore local area							
Eating out/socialising	£100	£40	£20	£40				
Equine care/activities	£80	£200	£1,200					
House maintenance/tradesmen /gardening	£500	£50	£300	£100	£400			
Florist	£20							
Newsagent	£90							
Church/charity donations	£85							
Personal care	£35	£10	£50	£100	£50			
Sailing expenses	£500							
Unspecified	£100	£200	£80	£12	£40	£10	£300	£1

Question 6: Approximately how many times over the past year have you undertaken recreational or leisure activities in the Alde-Ore local area?



Question 7: How often do you typically undertake the following activities in the Alde-Ore local area annually?

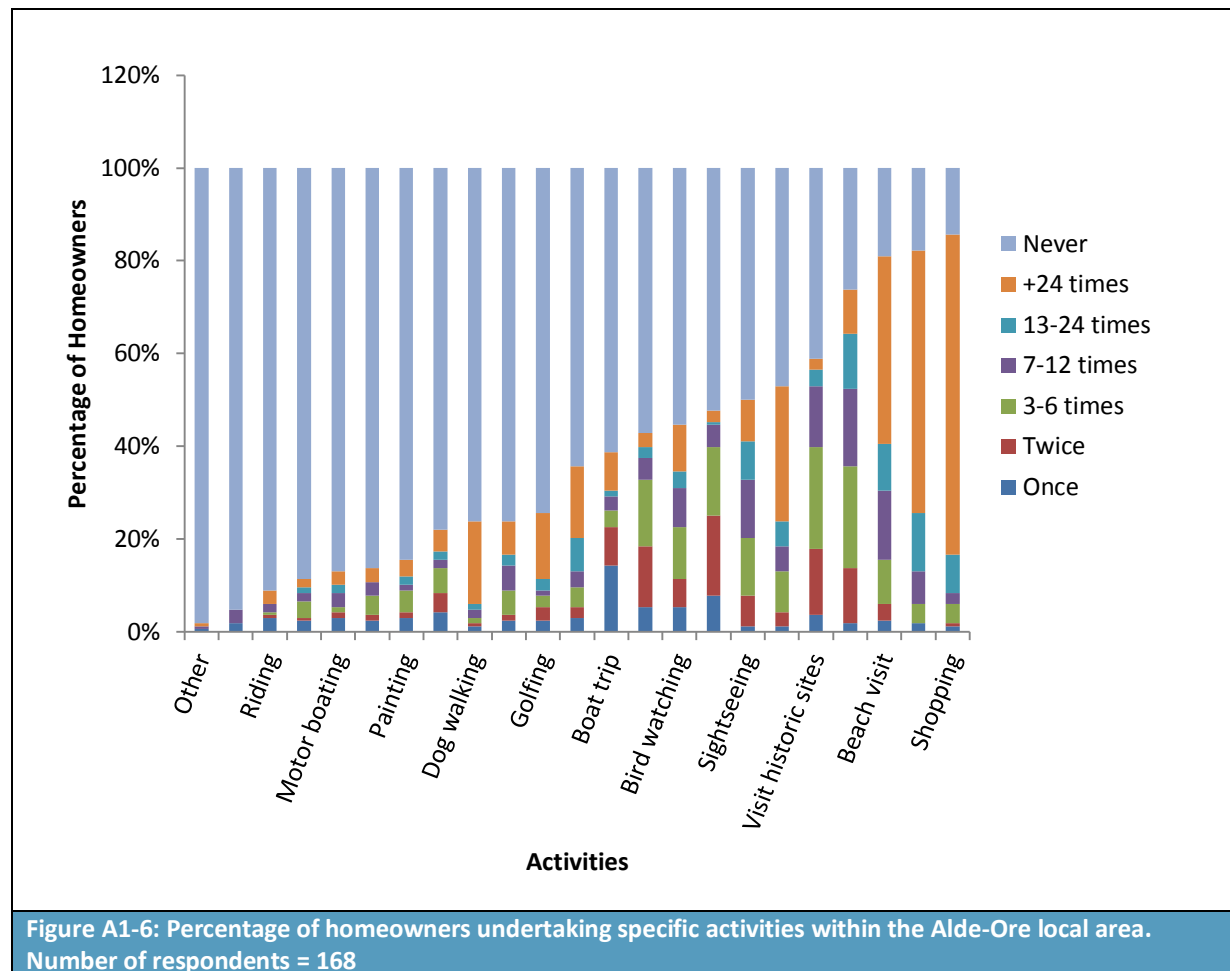


Table A1-5: "Other" responses to activities undertaken in the Alde-Ore area annually						
Other Activity	Once	Twice	3-6 times	7-12 times	13-24 times	+24 times
East Suffolk Decorative and Fine Arts Society				1		
Archaeology				1		
Bell ringing					1	
Churches			1			1
Gardening						1
Literary activities (Literary and Poetry festivals, Visiting Aldeburgh Library)		1	1			1
Shooting seagulls				1		
Singing						2
Socialising (Cinema, Eating out, Bowling, Calling on friends)			2	2	1	1
Sport (Badminton, Tennis)						3
voluntary driving						1

Additional 'other' categories given but with no indication of frequency:

- Voluntary work
- Swimming
- We support musical events that supports the local churches but have no interest in Snape music
- Car Boot
- Restaurants

A2.2 Second Homeowners

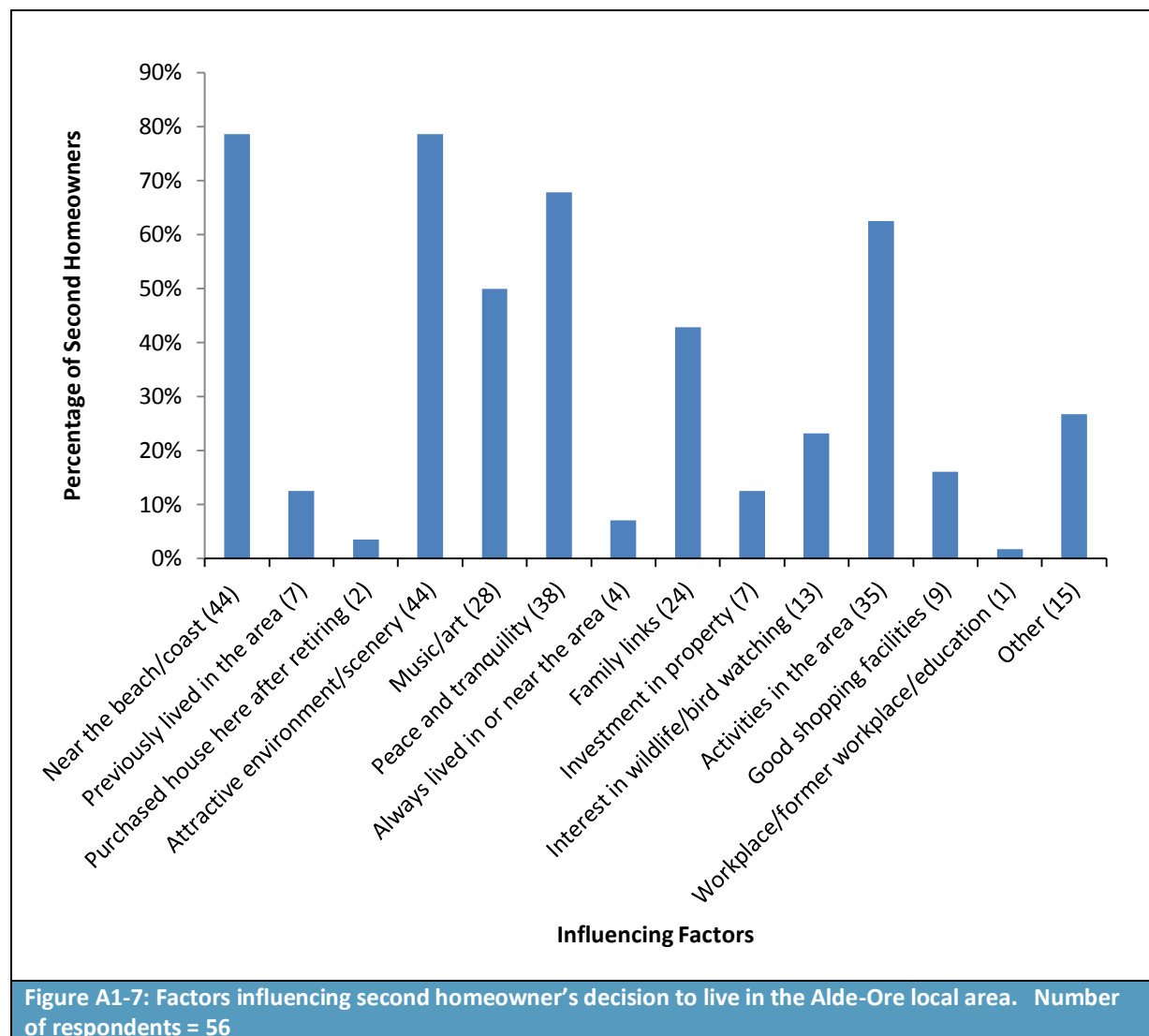
Question 8: What is the general location of your second home?

Table A1-6: General location of respondents second homes in the Alde-Ore local area		
Location	Number of responses	Percentage of individuals
Aldeburgh	31	52%
Aldringham Cum Thorpe	1	2%
Benhall	0	0%
Blaxhall	1	2%
Boyton	0	0%
Butley	0	0%
Capel St Andrew	1	2%
Chillesford	0	0%
Farnham	0	0%
Friston	0	0%
Gedgrave	0	0%
Hollesley	0	0%
Iken	4	7%
Orford	12	20%
Snape	0	0%
Sternfield	1	2%
Sudbourne	3	5%
Tunstall	0	0%
Wantisden	0	0%
Other	6	10%
Total number of respondents	60	100%

Other:

- Shingle Street
- Thorpeness
- Sizewell

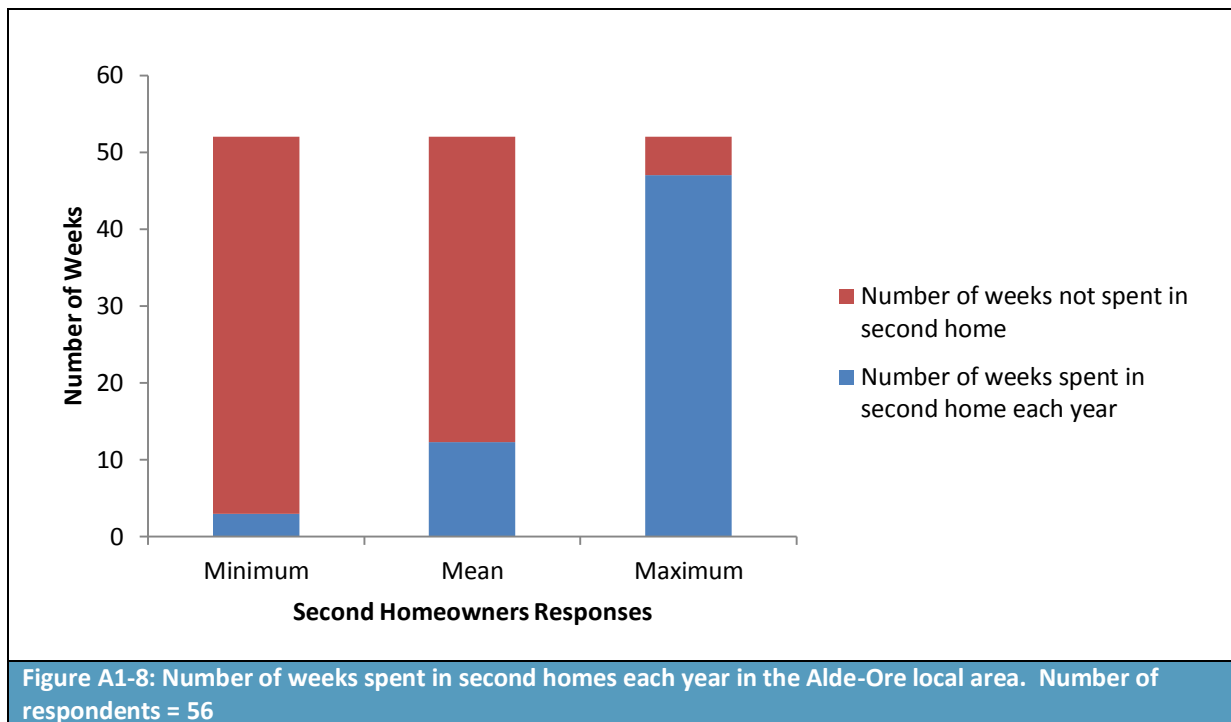
Question 9: What factor/factors influenced your decision to have a second home in the Alde-Ore area?



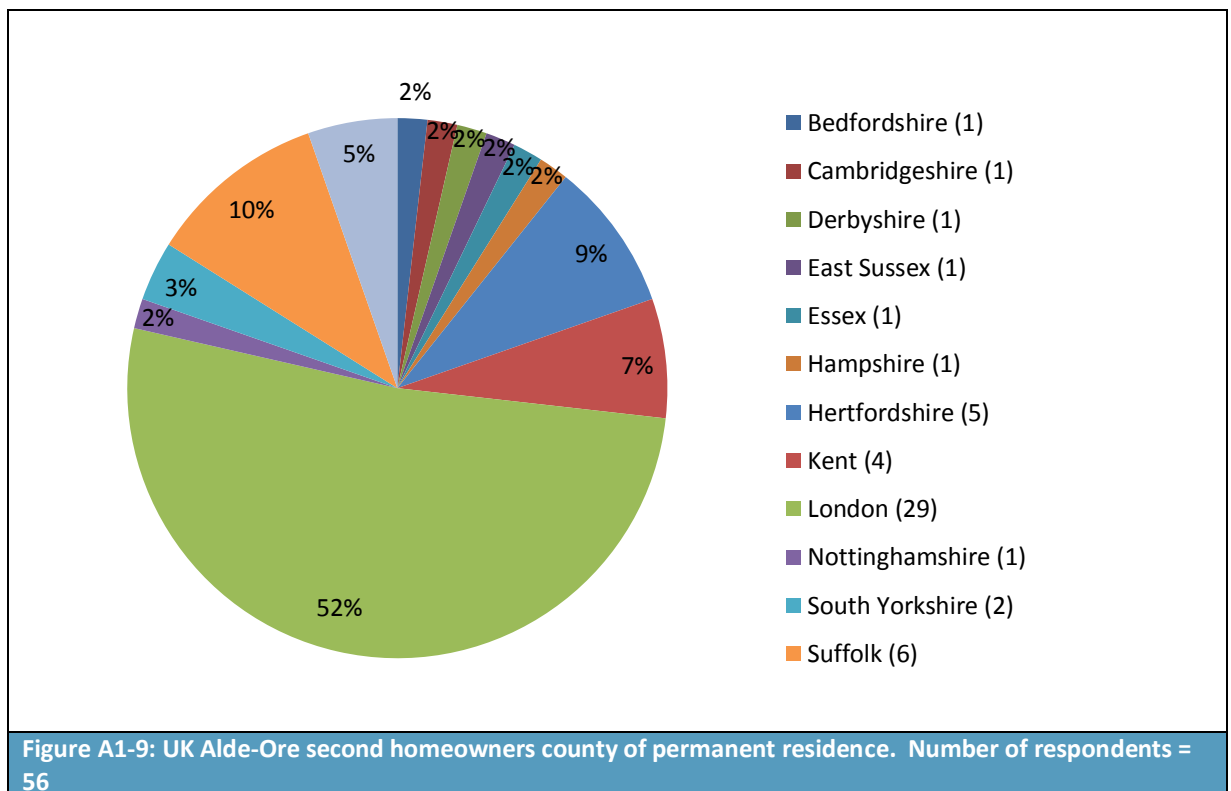
Other:

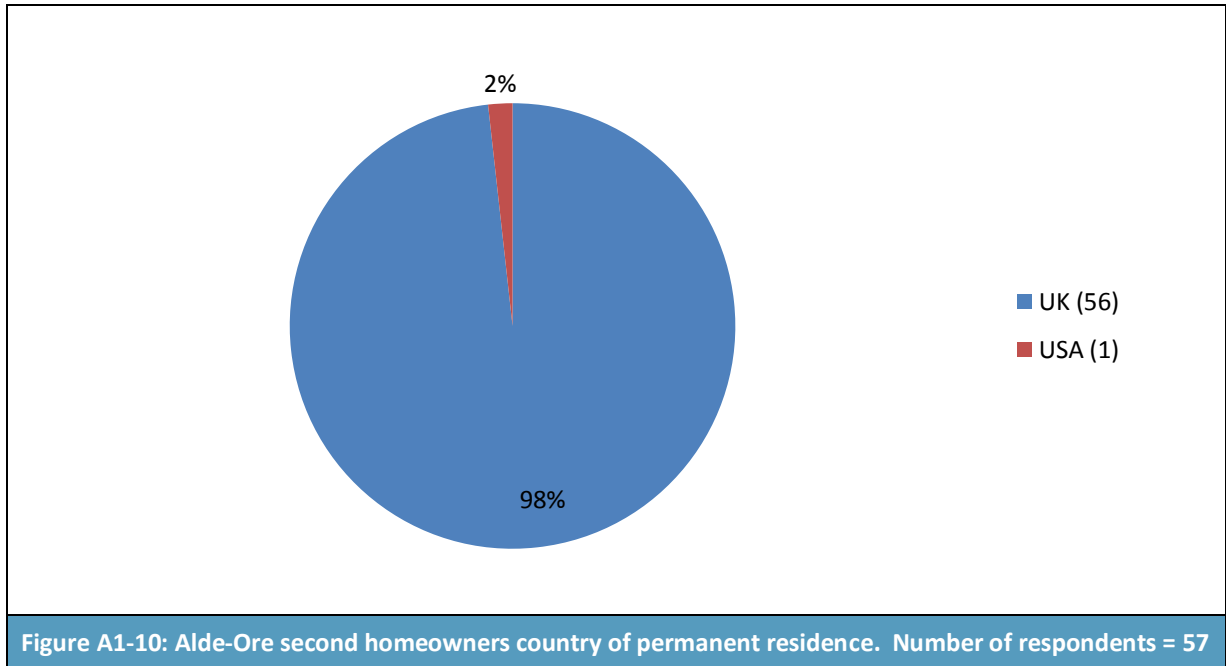
- Previous holiday location (4)
- Family/friends links (3)
- Specifics to Alde and Ore (activities, crowds, countryside, schools) (4)
- Want to retire here (1)

Question 10: On average, how many weeks do you spend in your second home each year?

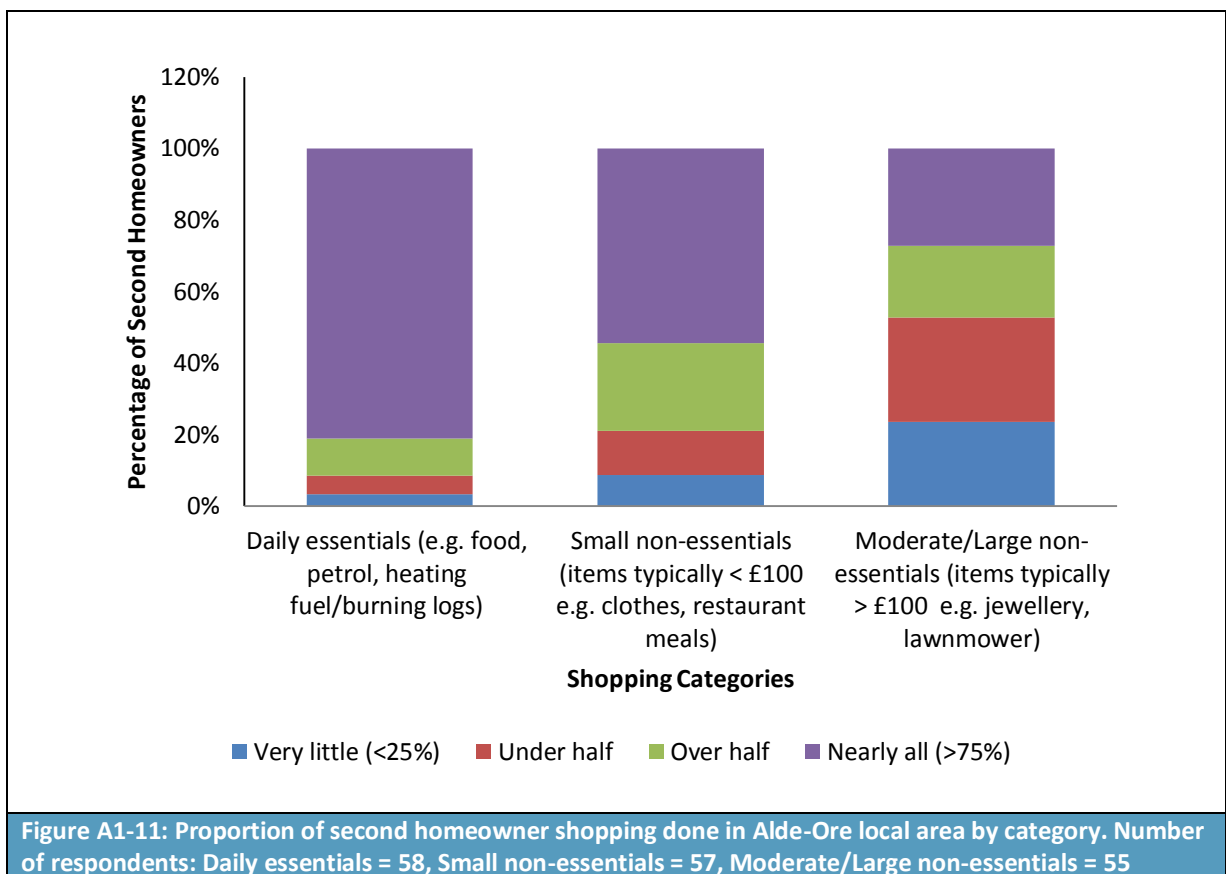


Question 11: In what County or Country is your usual place of residence?





Question 12: What proportion of the following shopping do you do in the Alde-Ore local area when staying in your second home?



Other:

- I spend 100% within 15 Mile Radius
- do not buy expensive items when in Suffolk
- Always buy everything locally to support the local economy.
- Complete modernisation/maintenance of my property. Repair and maintenance of four boats two large

Question 13: Please can you indicate how much your household is likely to spend in a typical WEEK in the Alde-Ore area on the following when staying in your second home. (To the nearest £)

Table A1-7: Second homeowners typical weekly household spend in the Alde-Ore local area				
Category	Number of responses	Mean	Minimum	Maximum
Admission fees into attractions	36	£20.70	£0.00	£120.00
Antiques/arts/crafts	35	£42.59	£0.00	£300.00
Concert going	37	£34.29	£0.00	£100.00
Food and drink	58	£310.32	£40.00	£5,800.00
Gifts/souvenirs	27	£20.71	£0.00	£100.00
Membership fees e.g. clubs	39	£62.41	£0.00	£300.00
Specialist equipment/maintenance e.g. sailing, boating, art, golf	32	£133.07	£0.00	£1,500.00
Travel (petrol and parking)	52	£57.44	£0.00	£200.00
Vessel storage and mooring	27	£127.59	£0.00	£1,600.00
Other	9	£20.70	£0.00	£120.00

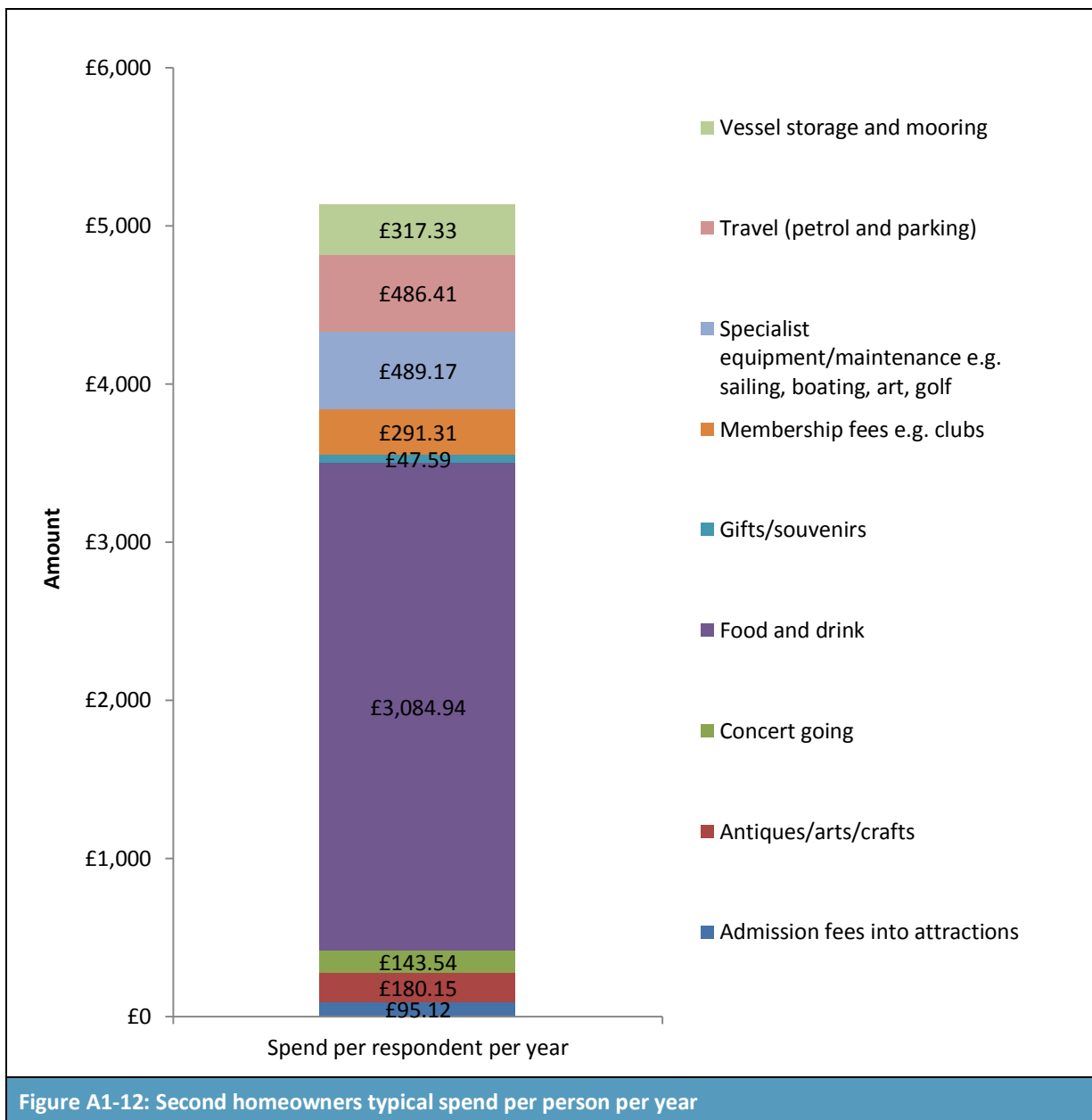
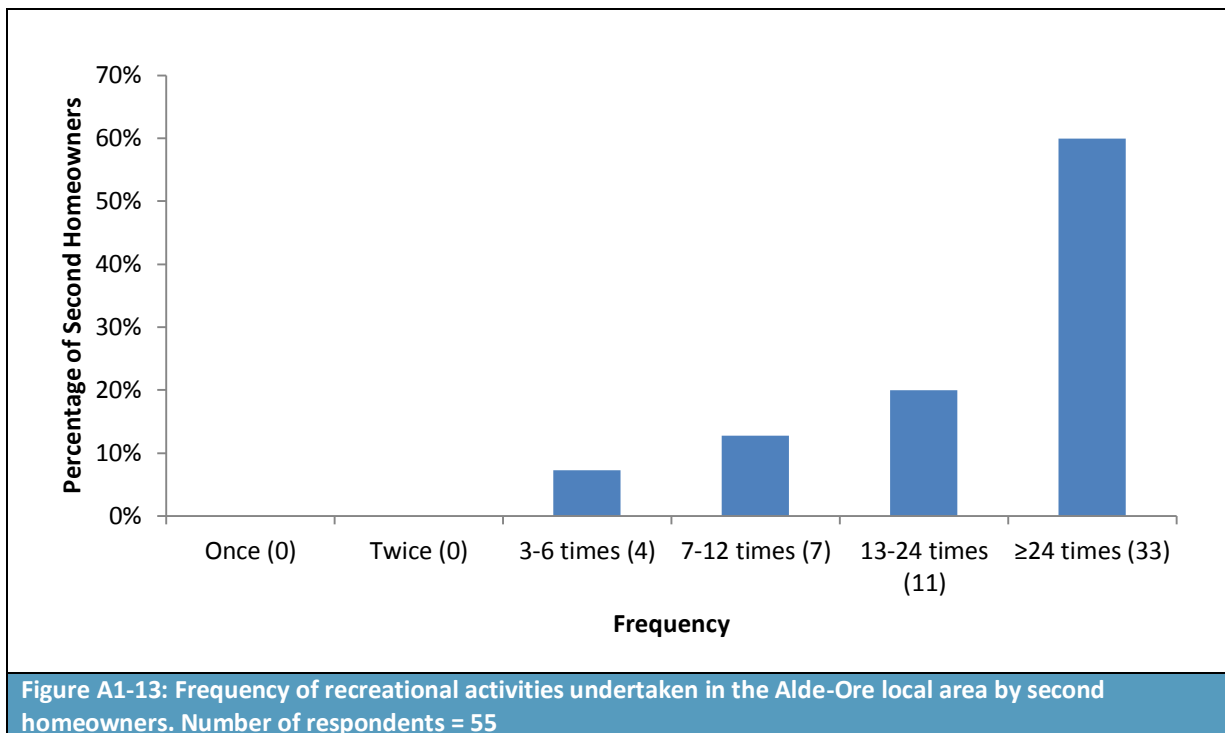
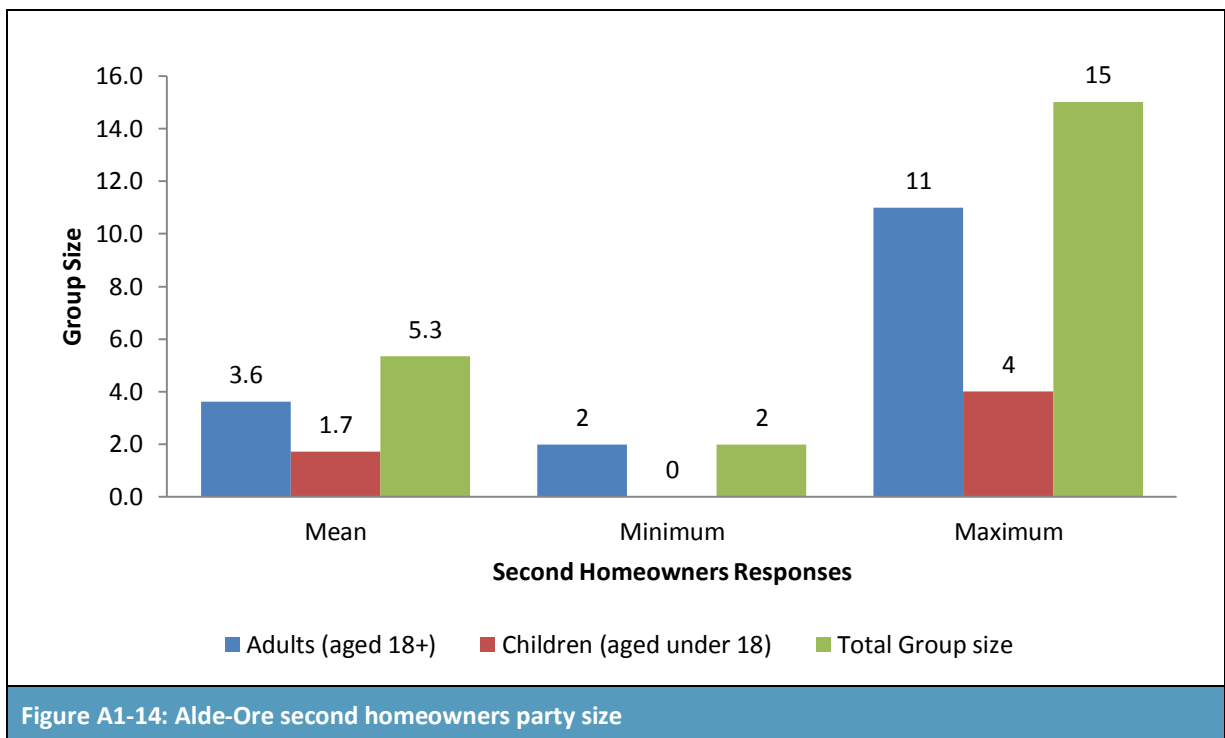


Table A1-8: "Other" comments on spending						
Category	Amount spent*					
House maintenance/tradesmen/gardening	£1500	£200	£125	£1000	£150	£400
* It is unclear as to whether the amounts specified in "other" are weekly, monthly or yearly.						

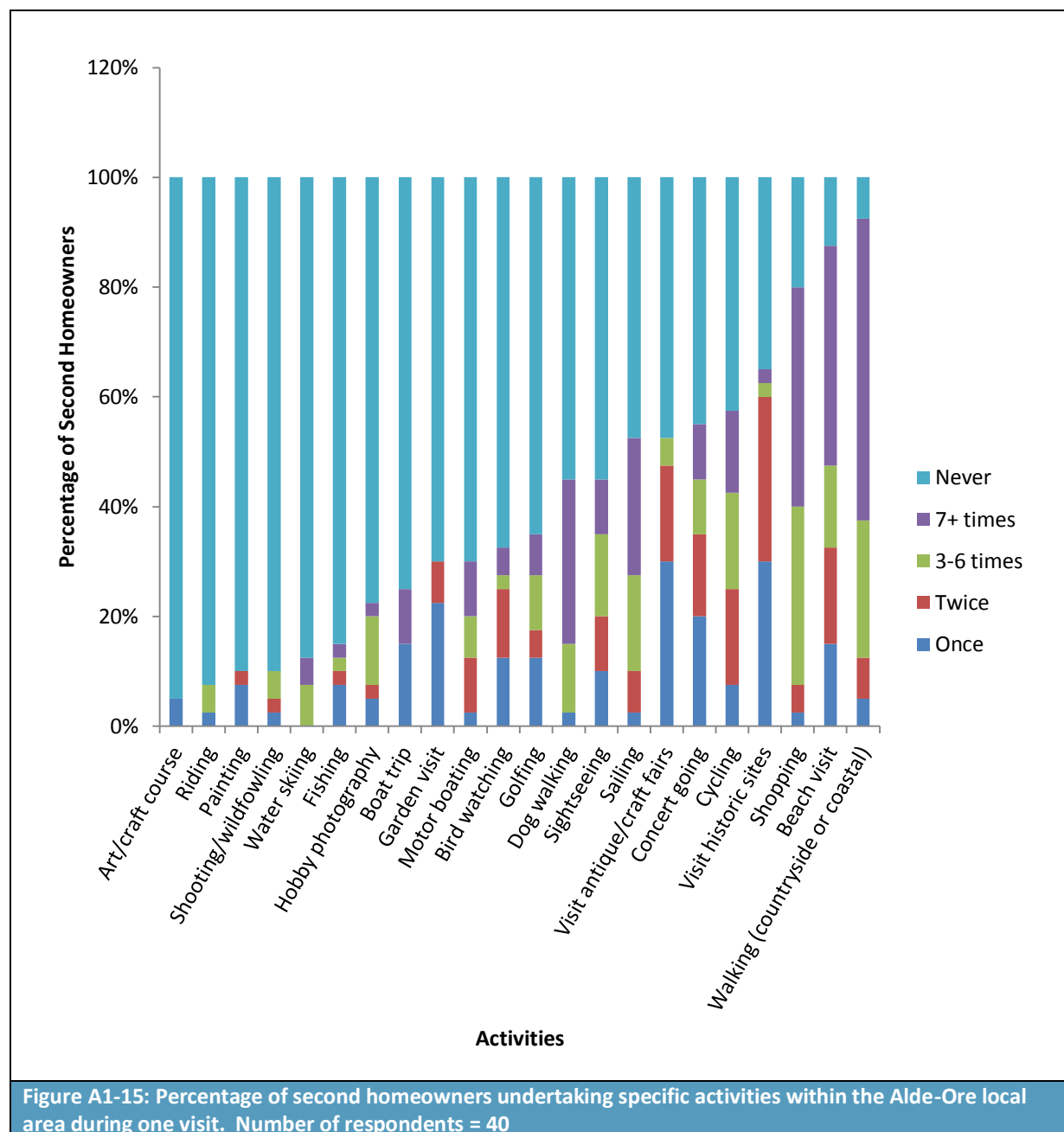
Question 14: Approximately how many times over the past year have you undertaken recreational or leisure activities in the Alde-Ore local area?



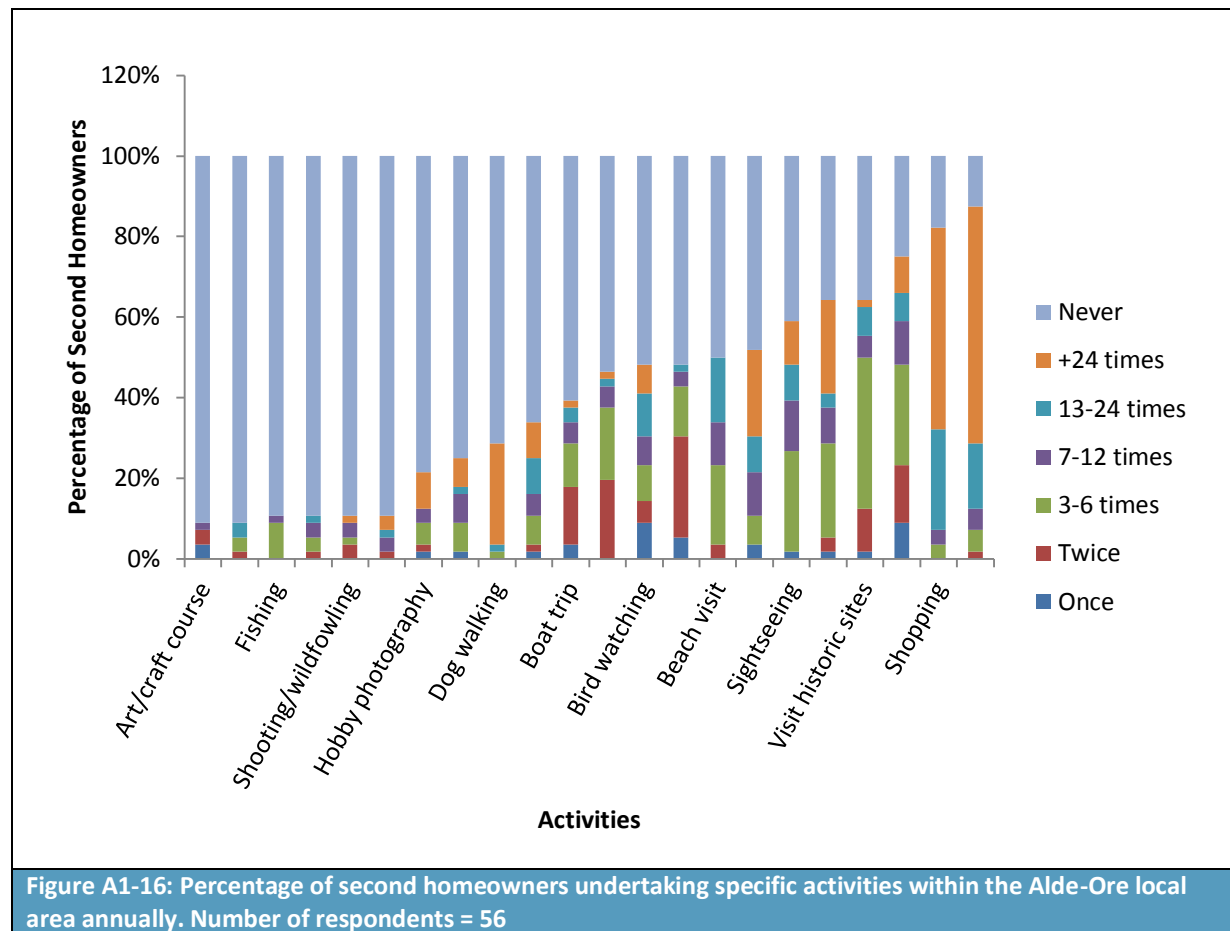
Question 15: How many people are accompanying you on your stay in the Alde-Ore area?



Question 16: How many times have you undertaken or do you intend to undertake the following activities in the Alde-Ore area on this stay?

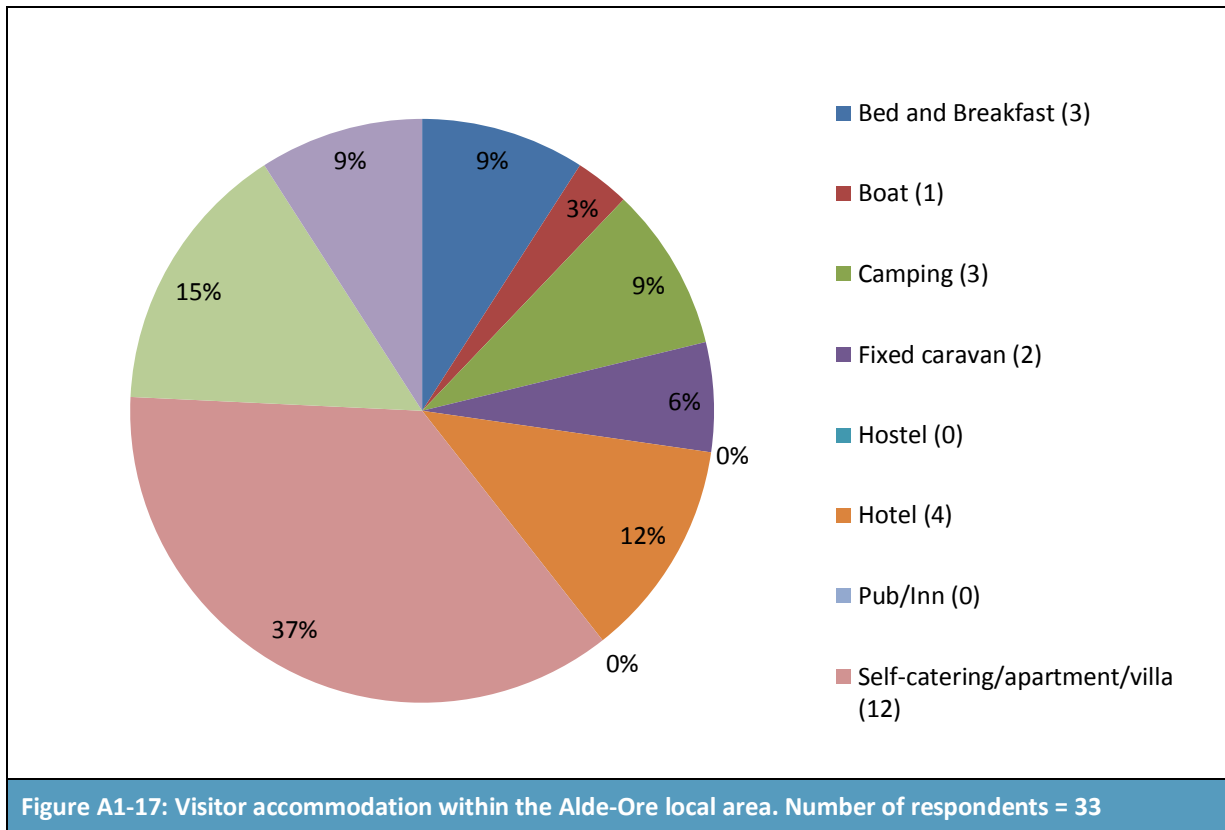


Question 17: How often do you typically undertake the following activities in the Alde-Ore local area ANNUALLY?



A2.3 Visitors

Question 18: What type of holiday or temporary accommodation are you staying in today?



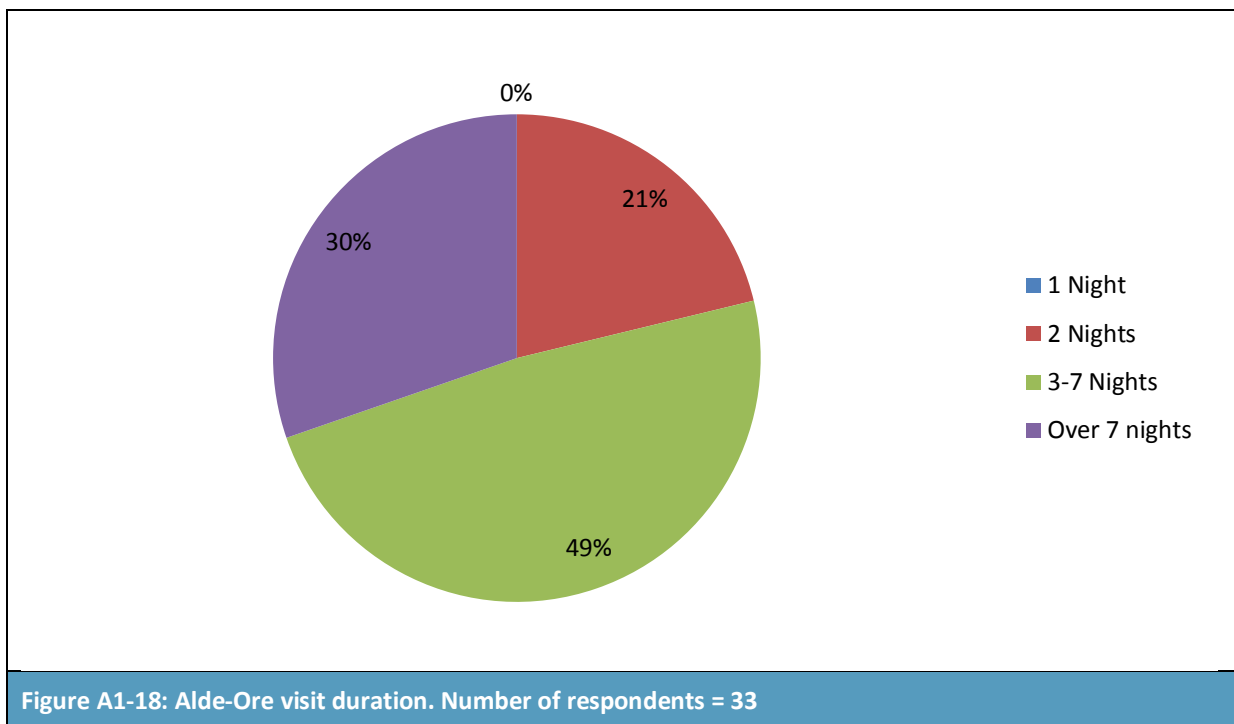
Question 19: What is the general location of your holiday or temporary accommodation?

Table A1-9: Location of visitors accommodation in the Alde-Ore local area. Number of respondents = 30		
Location	Number of respondents	Percentage of individuals
Aldeburgh	10	33%
Aldringham Cum Thorpe	0	0%
Benhall	1	3%
Blaxhall	0	0%
Boyton	0	0%
Butley	0	0%
Capel St Andrew	0	0%
Chillesford	0	0%
Farnham	0	0%
Friston	0	0%
Gedgrave	0	0%
Hollesley	0	0%
Iken	0	0%
Orford	5	17%
Snape	2	7%
Sternfield	0	0%
Sudbourne	1	3%
Tunstall	0	0%
Wantisden	0	0%
Other	11	37%
Number of respondents	30	100%

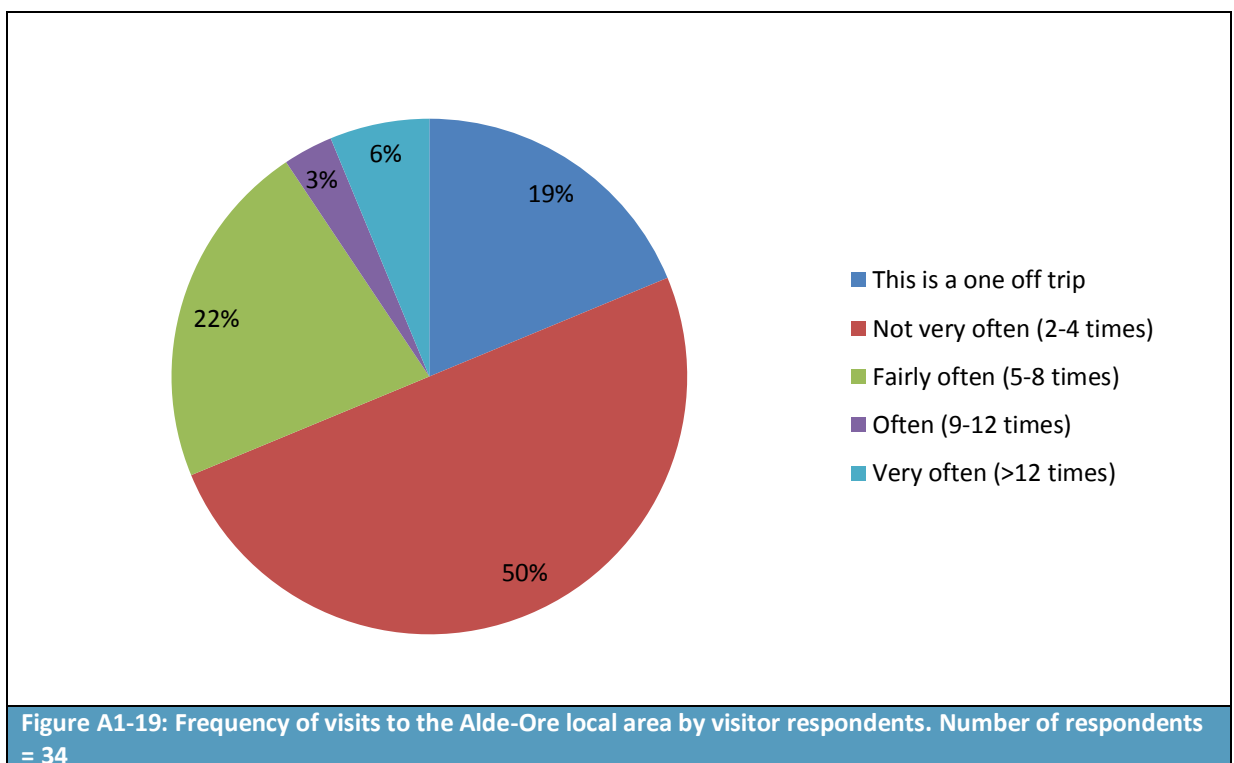
Other:

- Saxmundham 1
- Thorpeness 1
- No entry 3
- On river Alde 1
- Leiston 1
- Rendlesham 1
- Eyke/Melton 1
- Darsham 1
- Eyke 1

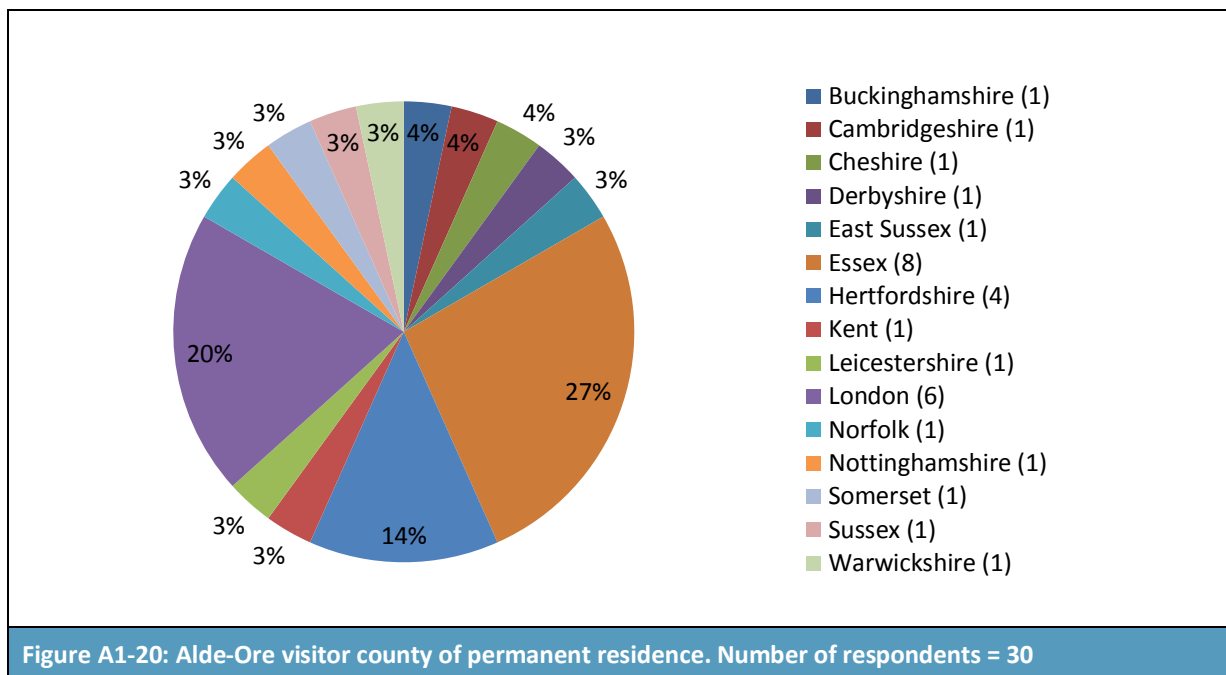
Question 20: How long are you staying in the Alde-Ore local area?



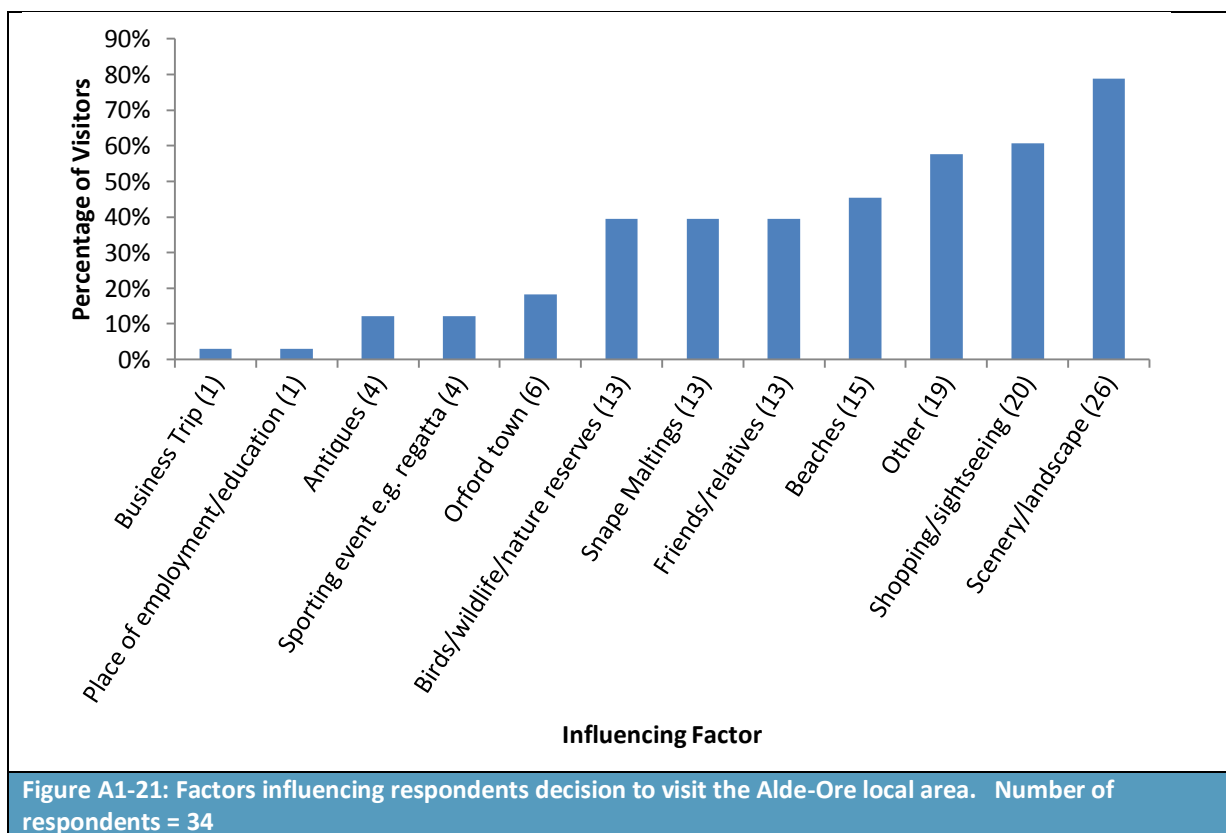
Question 21: On average how often do you visit the Alde-Ore local area annually?



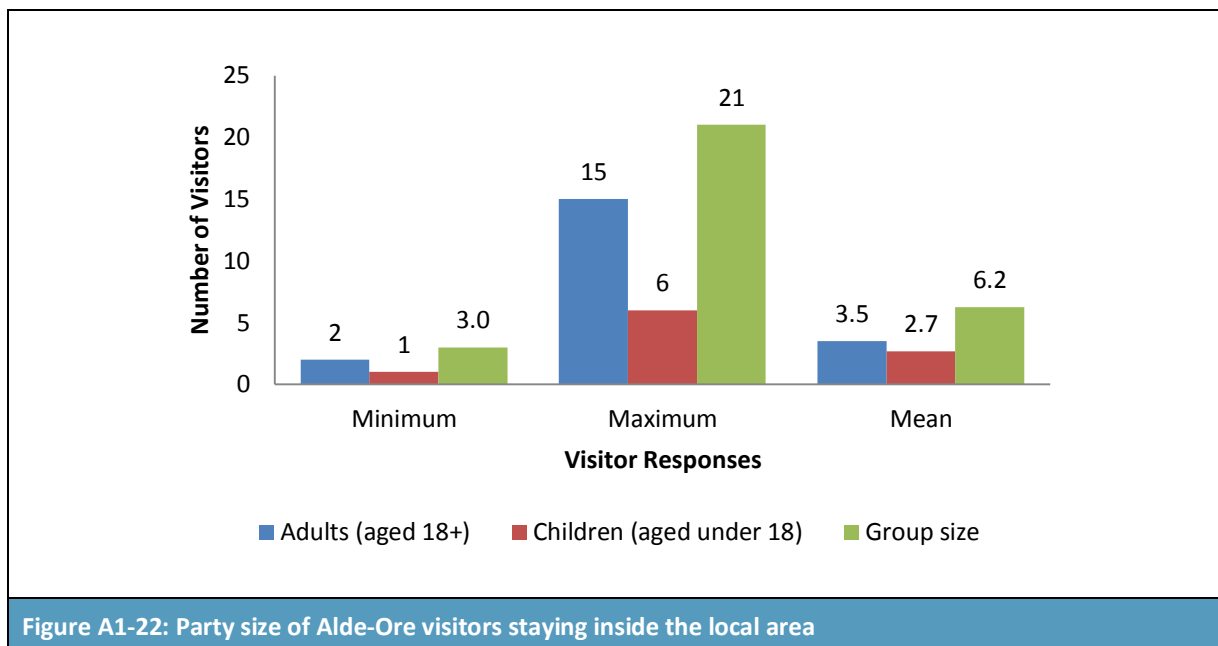
Question 22: In what County or Country is your usual place of residence?



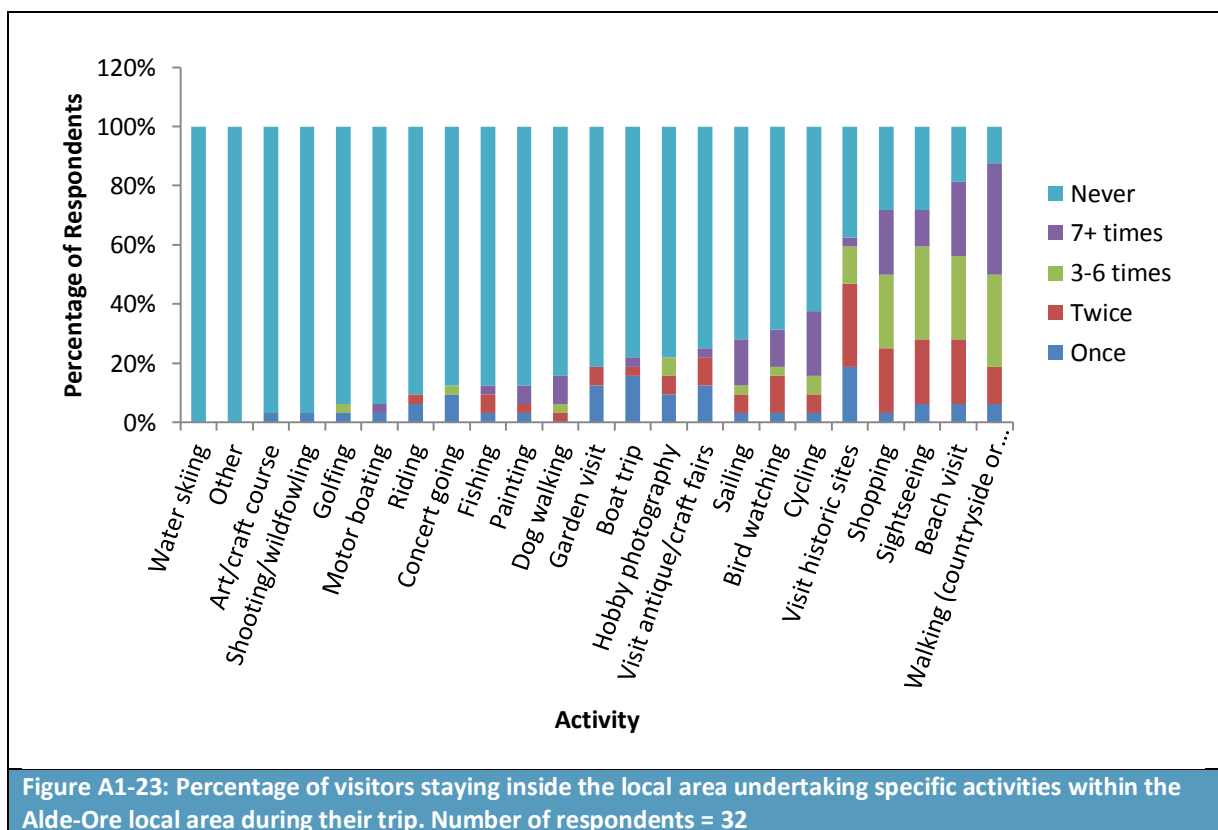
Question 23: Which of the following factor/factors influenced your decision to visit the Alde-Ore local area?

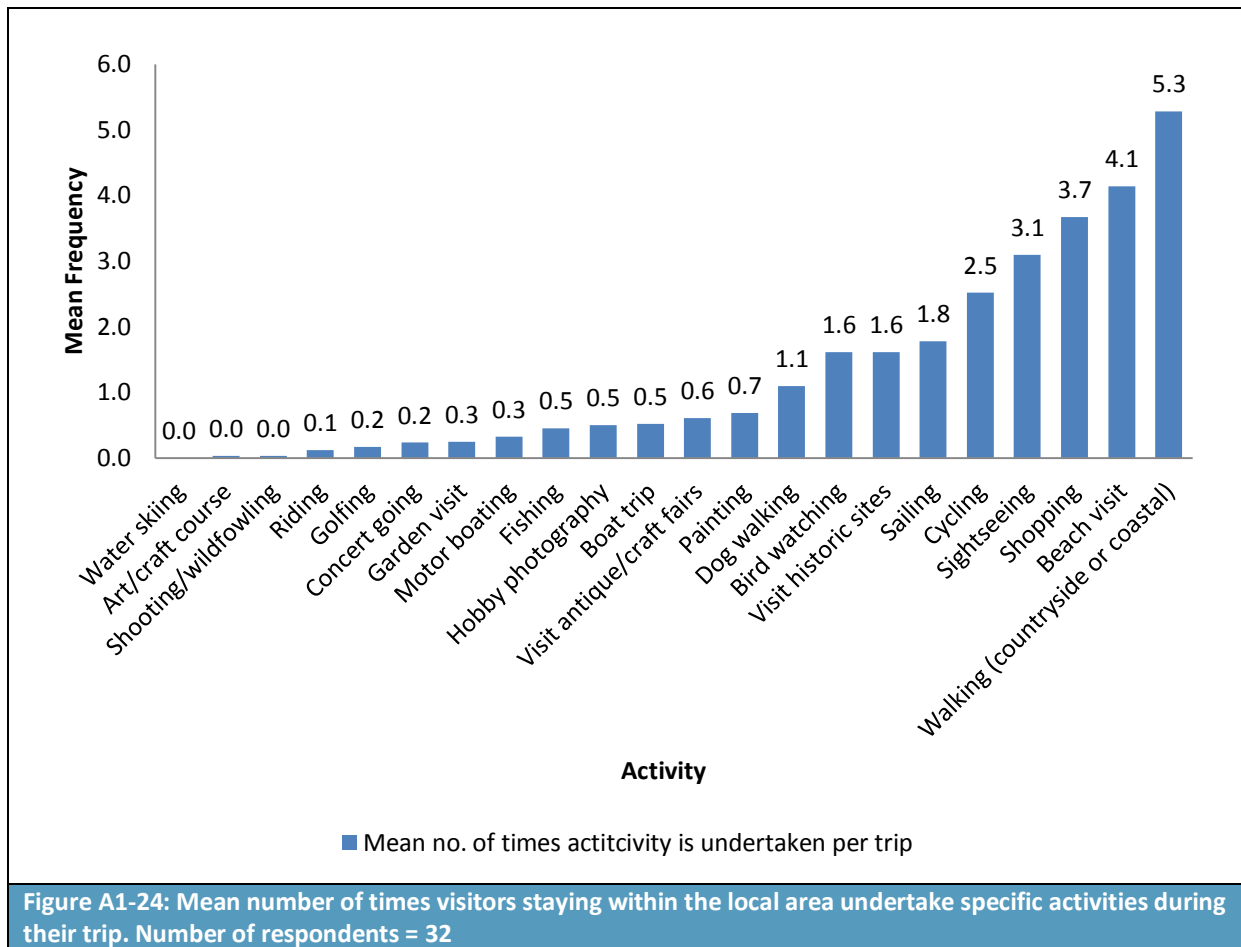


Question 24: How many people are accompanying you on your trip today?



Question 25: How many times have you undertaken or do you intend to undertake the following activities in the Alde-Ore area on this trip?

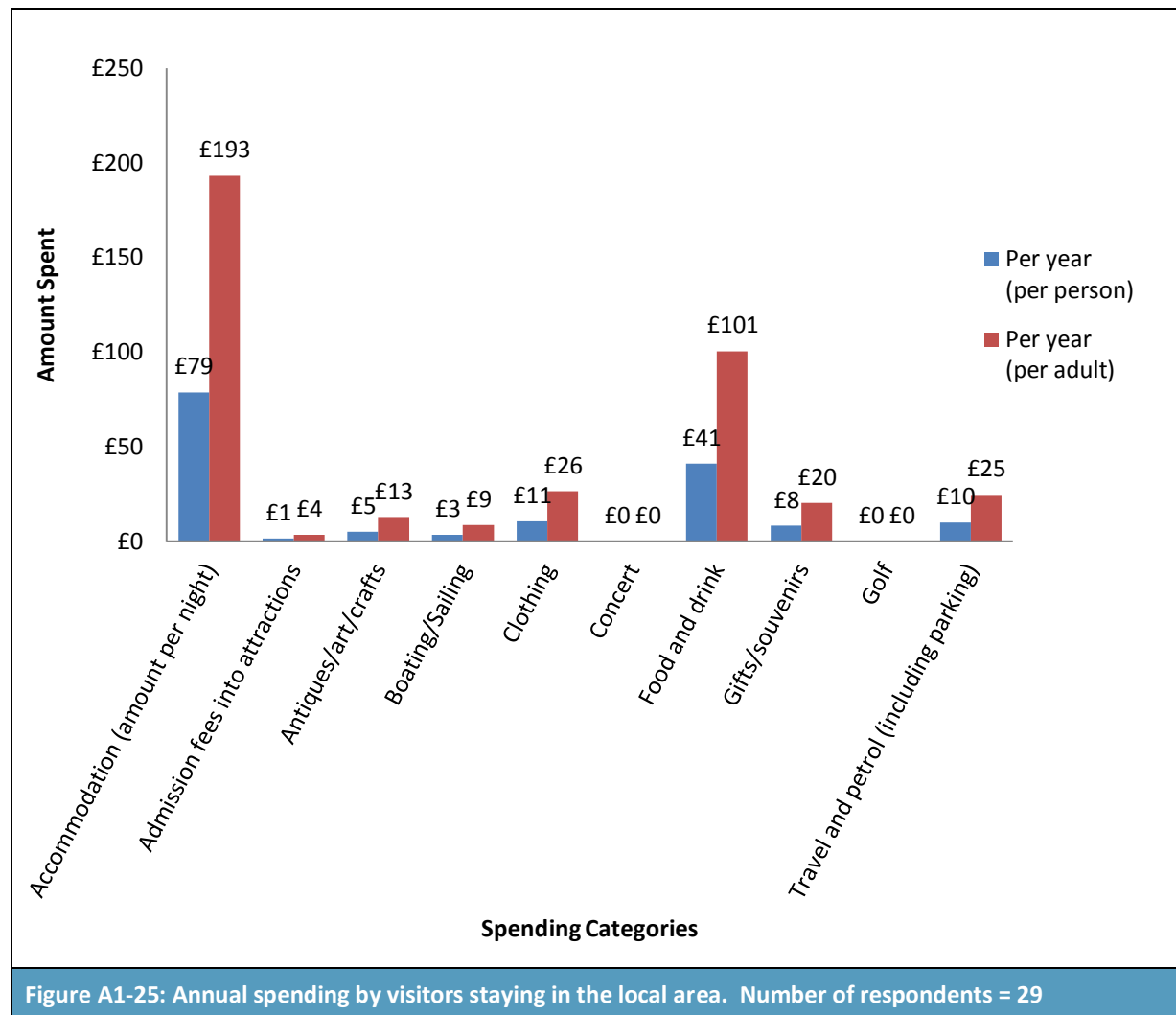




Other:

- Barbecue
- Thorpeness Meare
- On beach with children
- Thorpeness
- Southwold
- Jimmy's Farm
- Special sightseeing Car Club
- Wedding
- Meeting friends (50th birthday)
- Restaurants
- Eating out
- 'nosing around'
- Local food!
- Food! eg Crown and Castle, Orford smokehouse

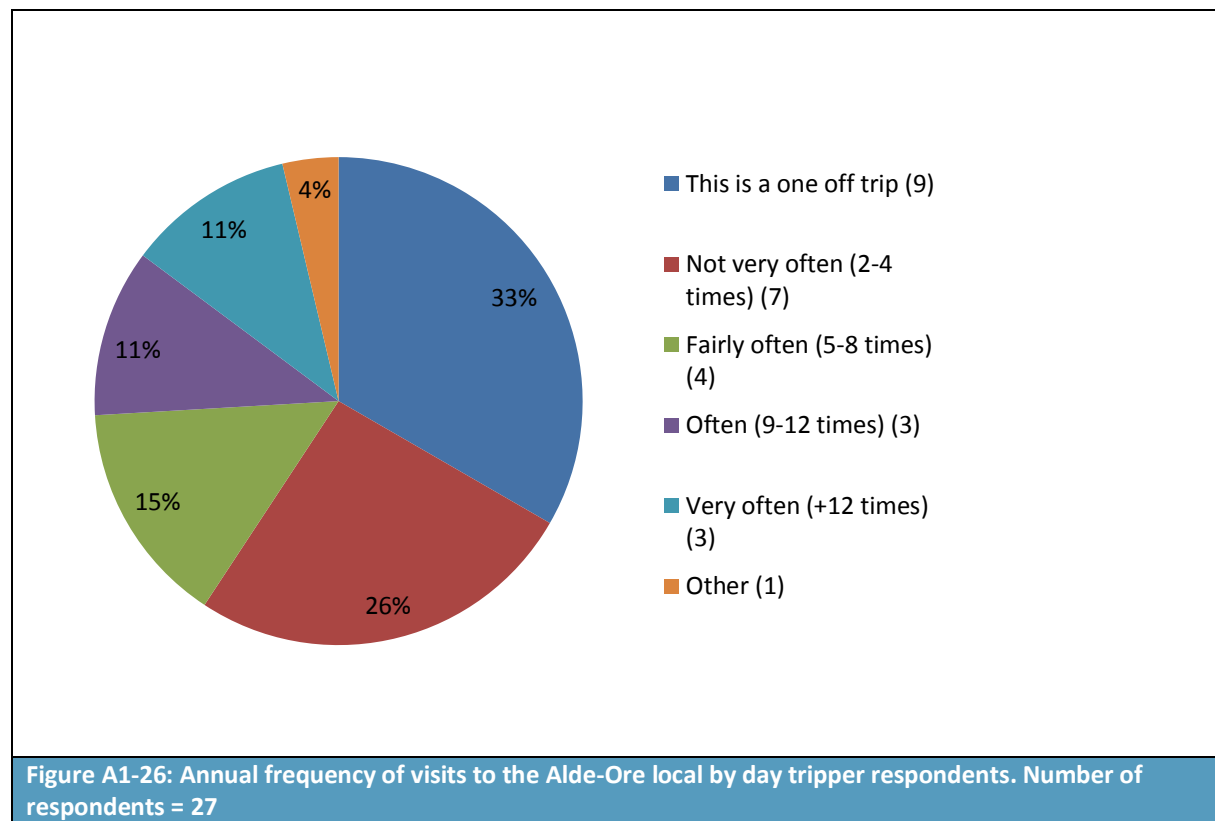
Question 26: Can you indicate how much your party has spent or is likely to spend within the Alde-Ore area TODAY on the following? (To the nearest £)



Other:

- Boating equipment £5
- Carnival/funfair £50
- Ice cream
- £30
- Specialist equipment £80
- Meals out (separate)
- Food to take away from area
- Food purchases £30

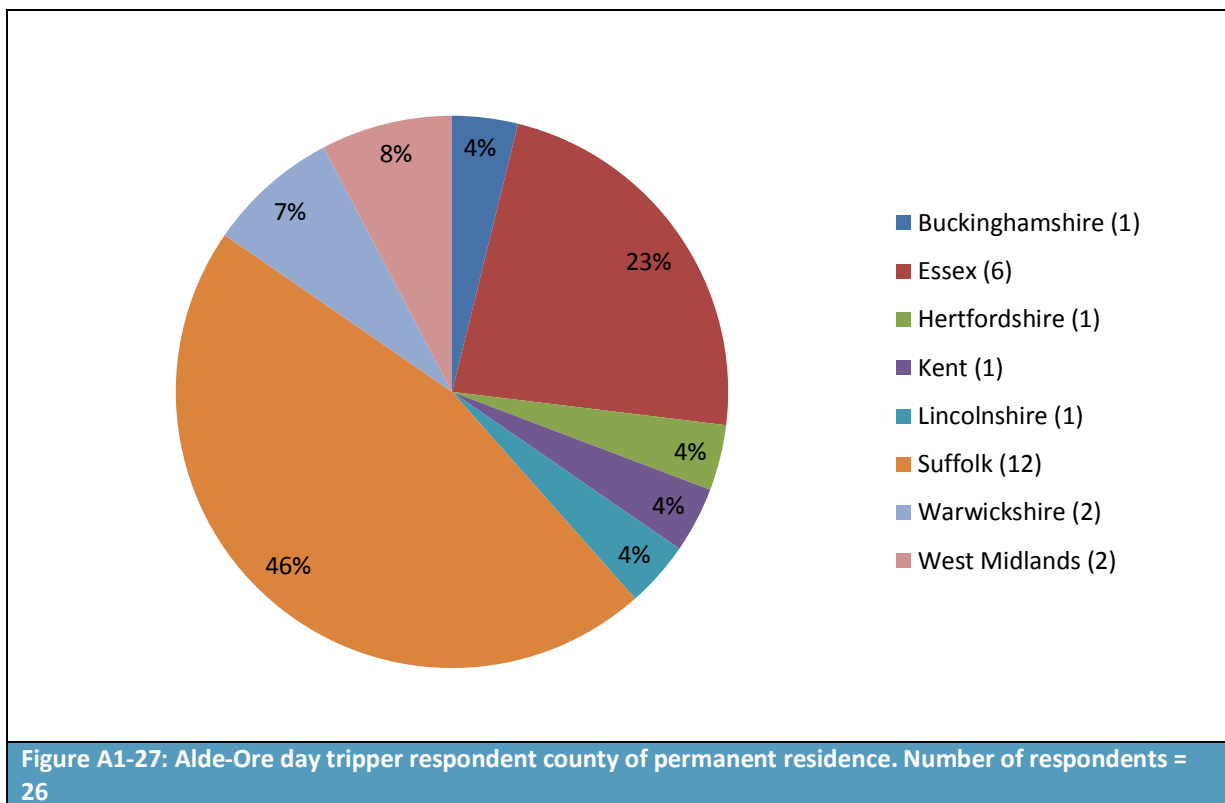
Question 27: On average how often do you visit the Alde-Ore local area annually?



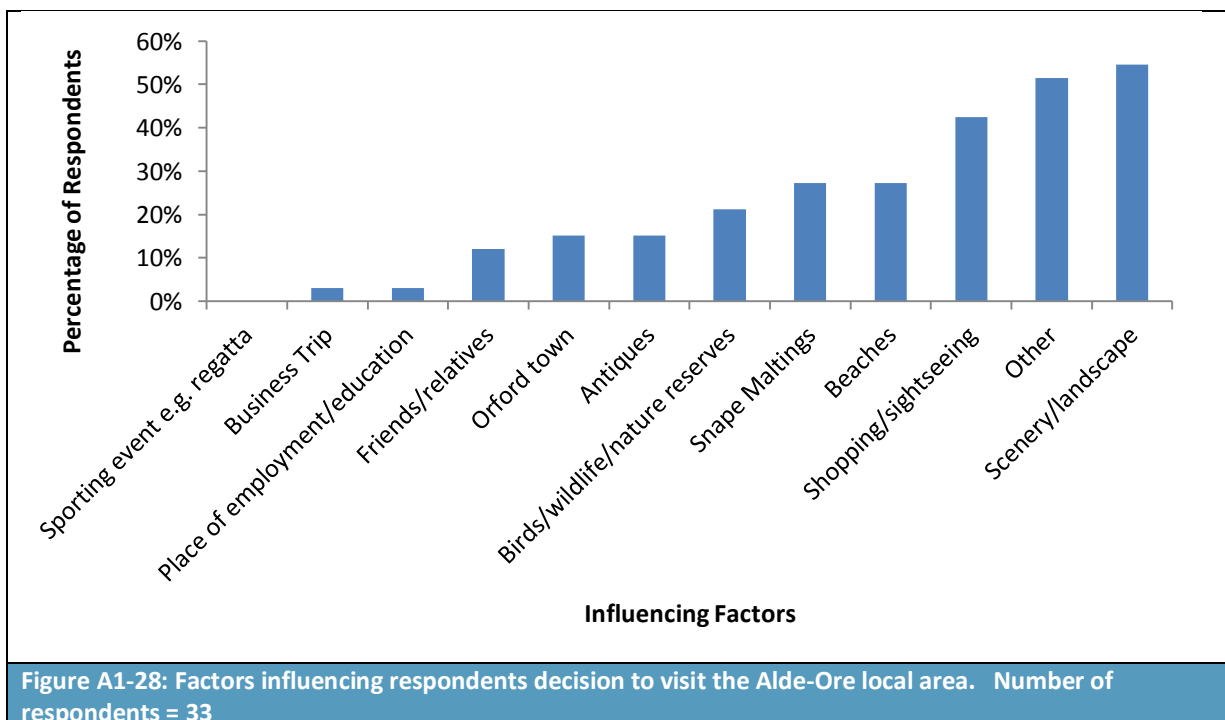
Other:

- ..but will come back lots..

Question 28: In what County or Country is your usual place of residence?



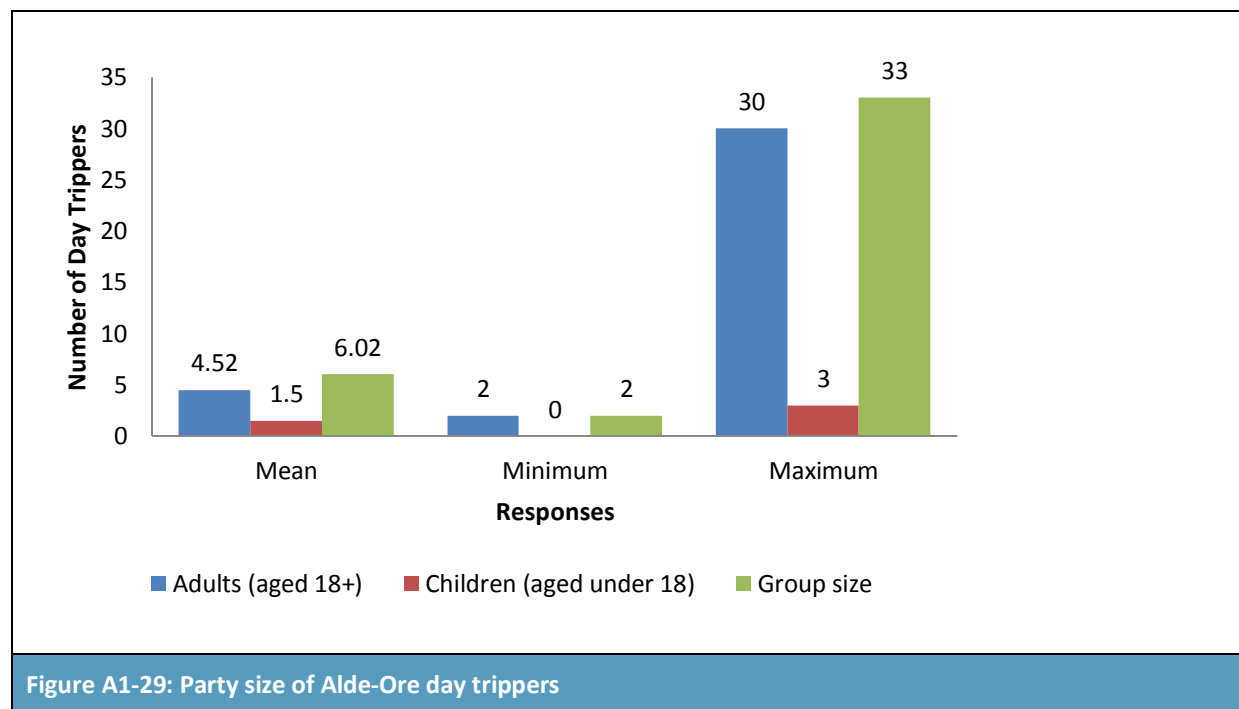
Question 29: Which of the following factor/factors influenced your decision to visit the Alde-Ore local area?



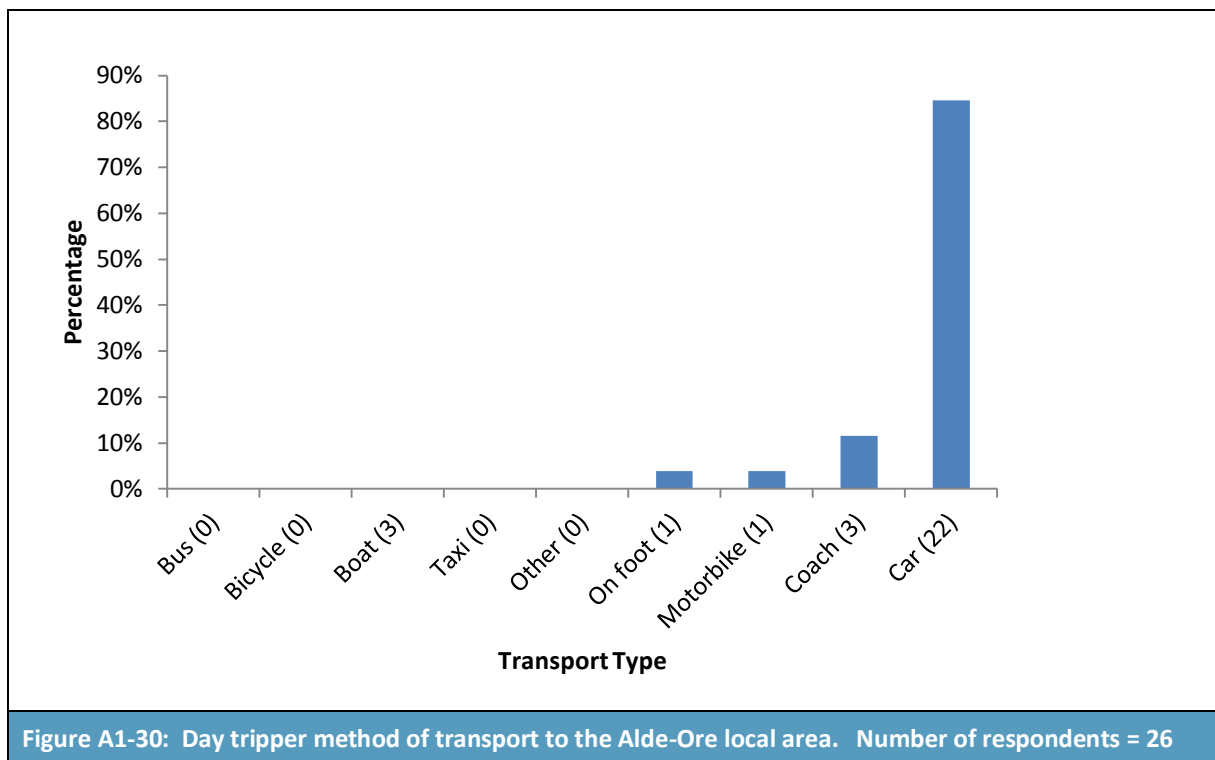
Other:

- Boat trip - Lady Florence (1)
- Orford castle, history (1)
- Aldeburgh (10)
- Always wanted to come/recommendation (1)
- Honeymoon location (1)
- One day of 7 day coach trip (1)
- Eating (1)
- Day out (1)
- Holiday itinerary (1)

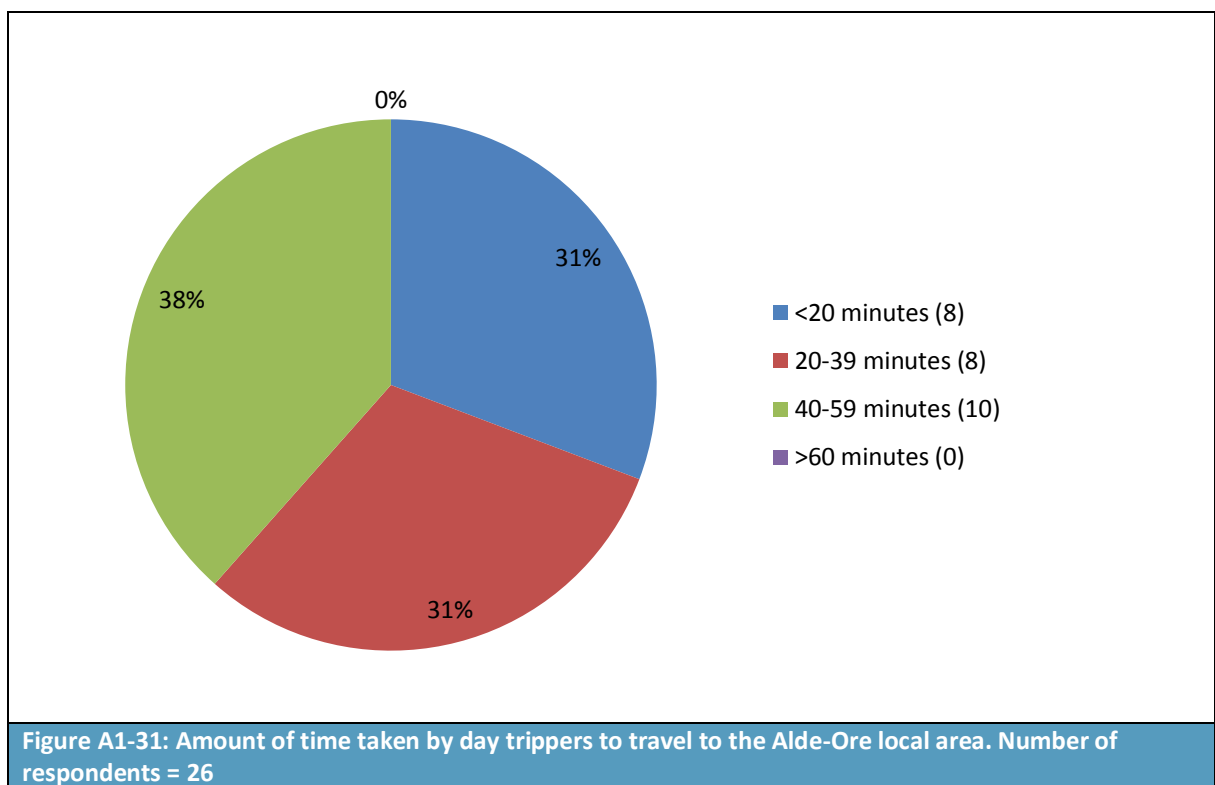
Question 30: How many people are accompanying you on your trip today?



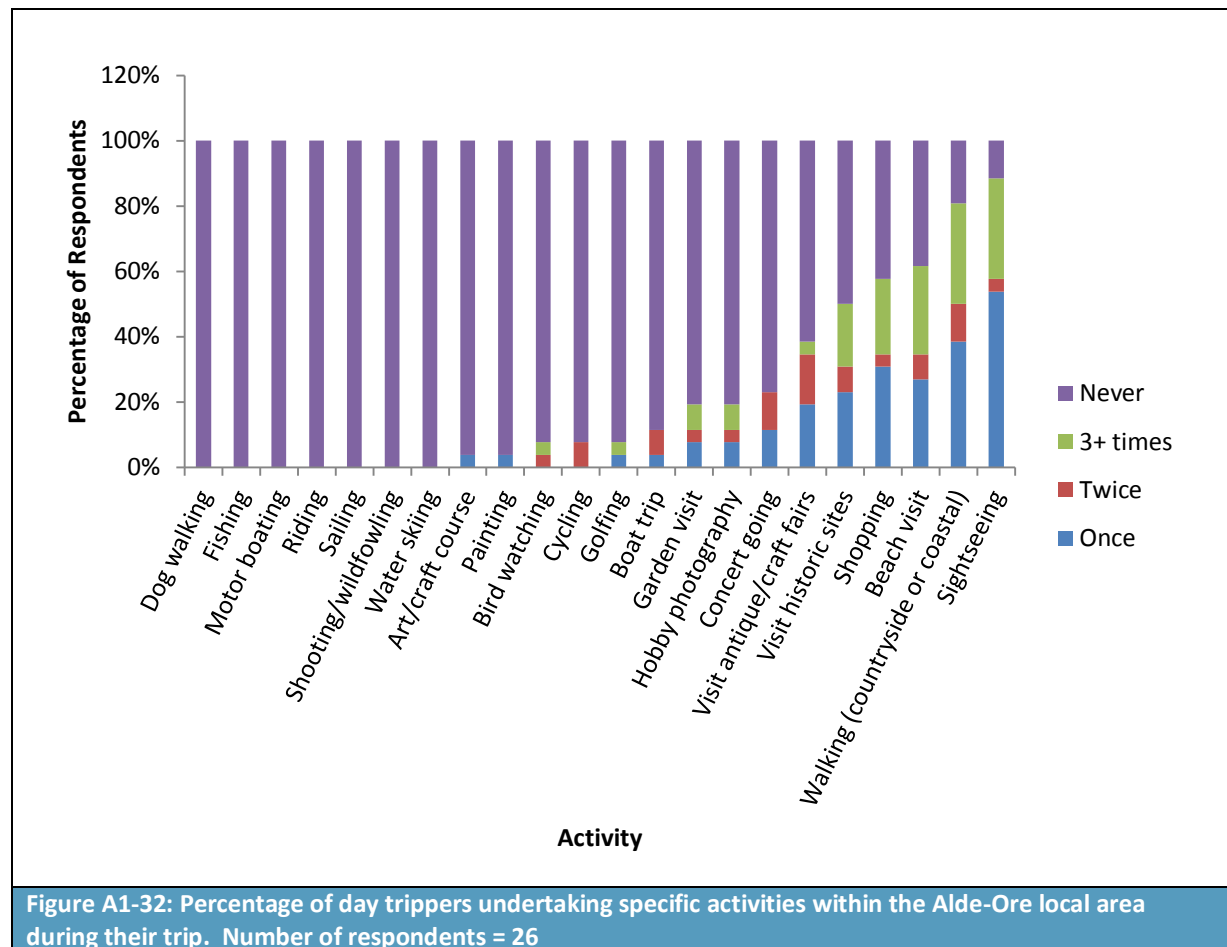
Question 31: How did you travel to the Alde-Ore local area today?



Question 32: How long did it take you to travel to the Alde-Ore local area today?



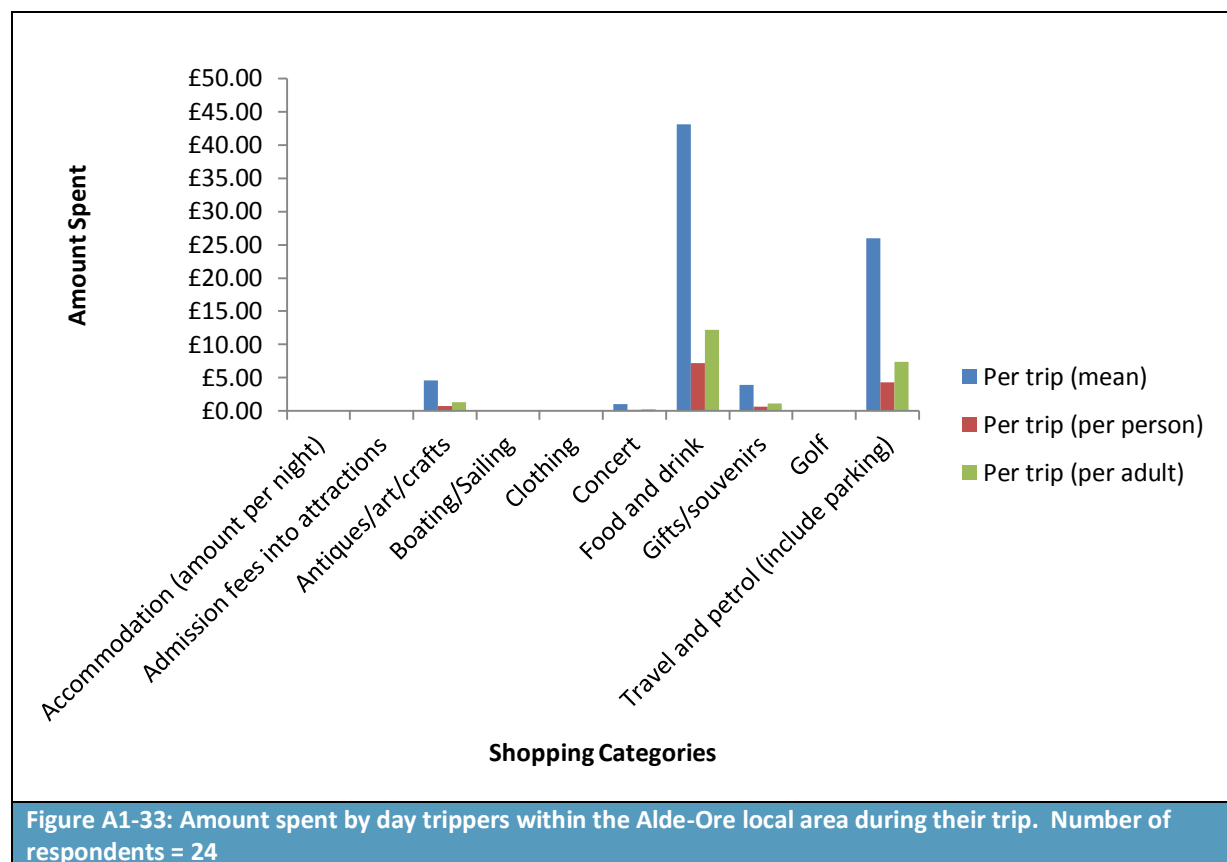
Question 33: How many times have you undertaken or do you intend to undertake the following activities in the Alde-Ore area on this day trip?



Other:

- Restaurant (3-6 times)
- Fish & Chips
- Tea shop (Cragg Sisters)
- Restaurants (3-6 times)
- Fish restaurant, Southwold.
- Farm shops (once)
- Aldeburgh Theatre
- Meals/food, farm shop

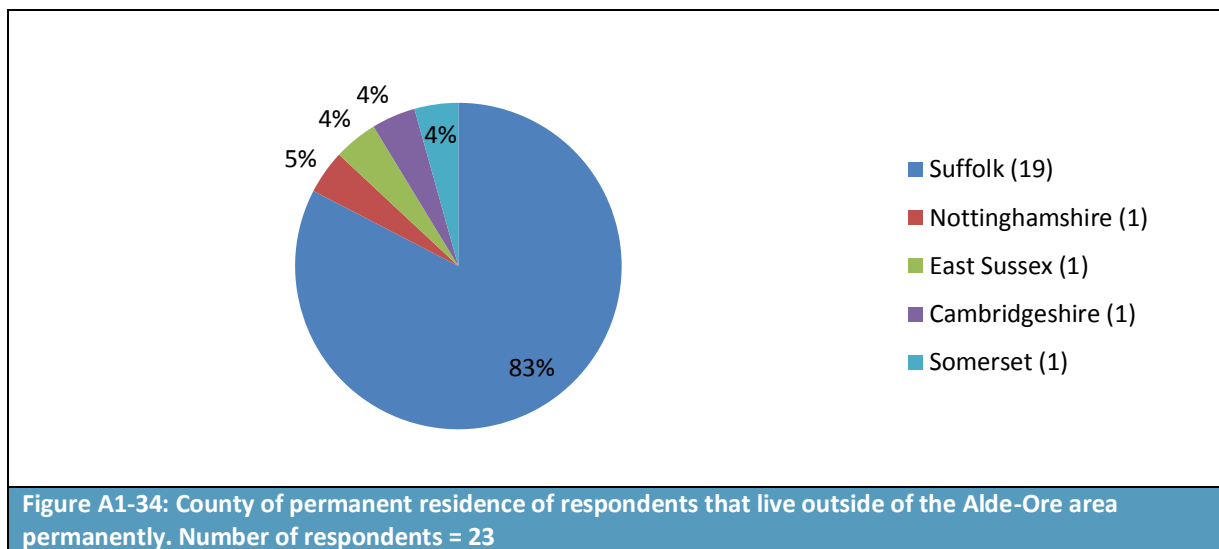
Question 34: Can you indicate how much your party has spent or is likely to spend WITHIN the Alde-Ore area TODAY on the following? (To the nearest £)



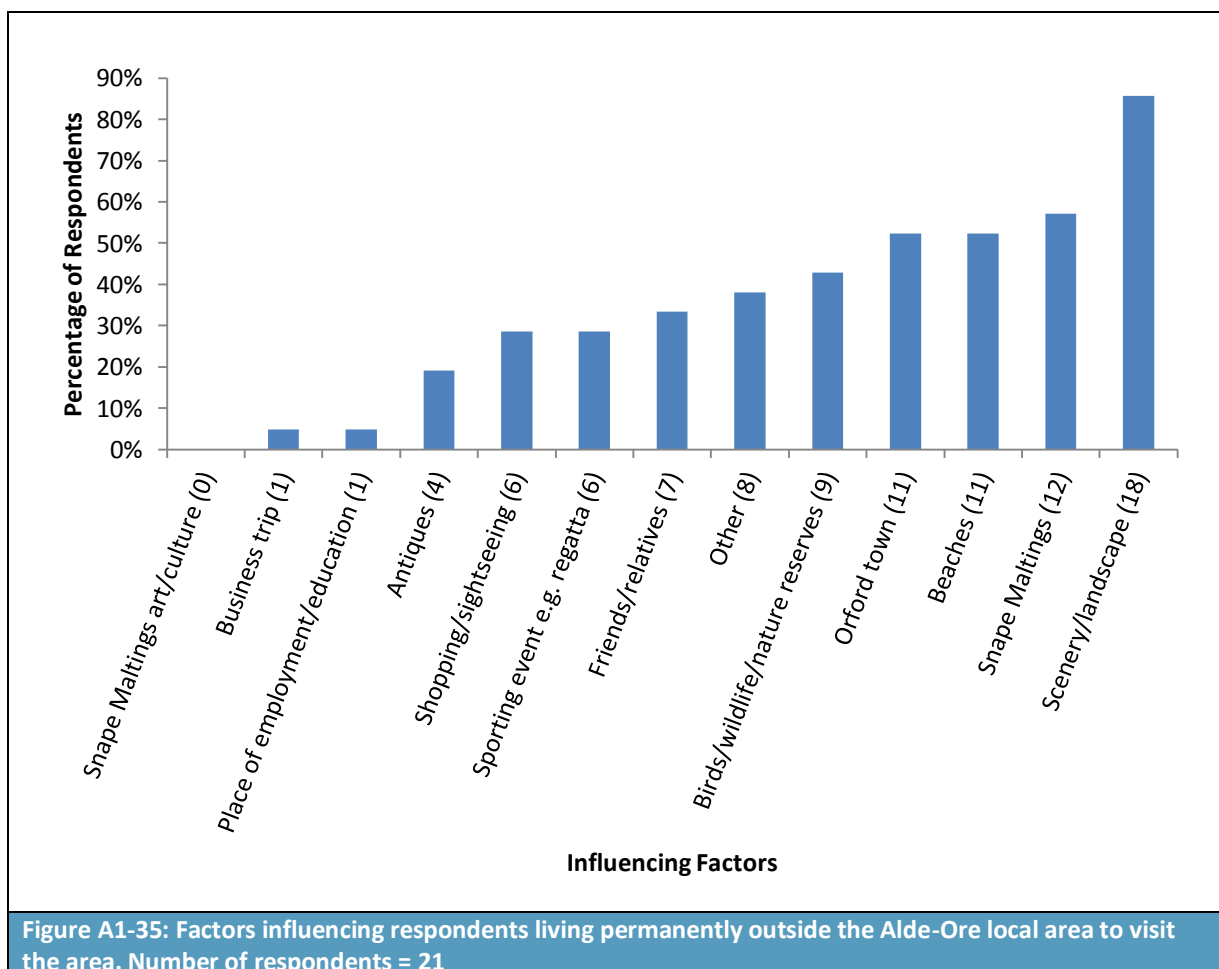
Other:

- Lady Florence trip
- £300 in total
- Ice cream
- Newspaper

Question 35: In what County or Country is your usual place of residence?



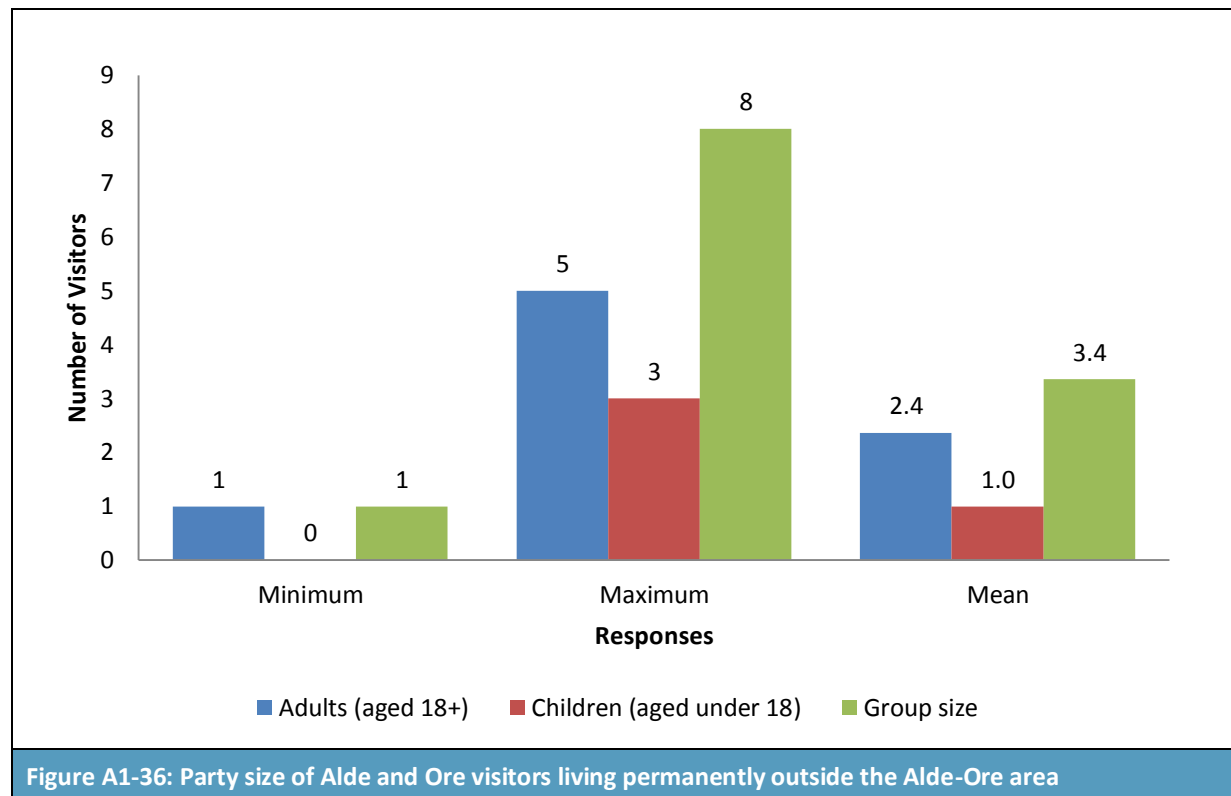
Question 36: Which of the following factor/factors influenced your decision to visit the Alde-Ore local area?



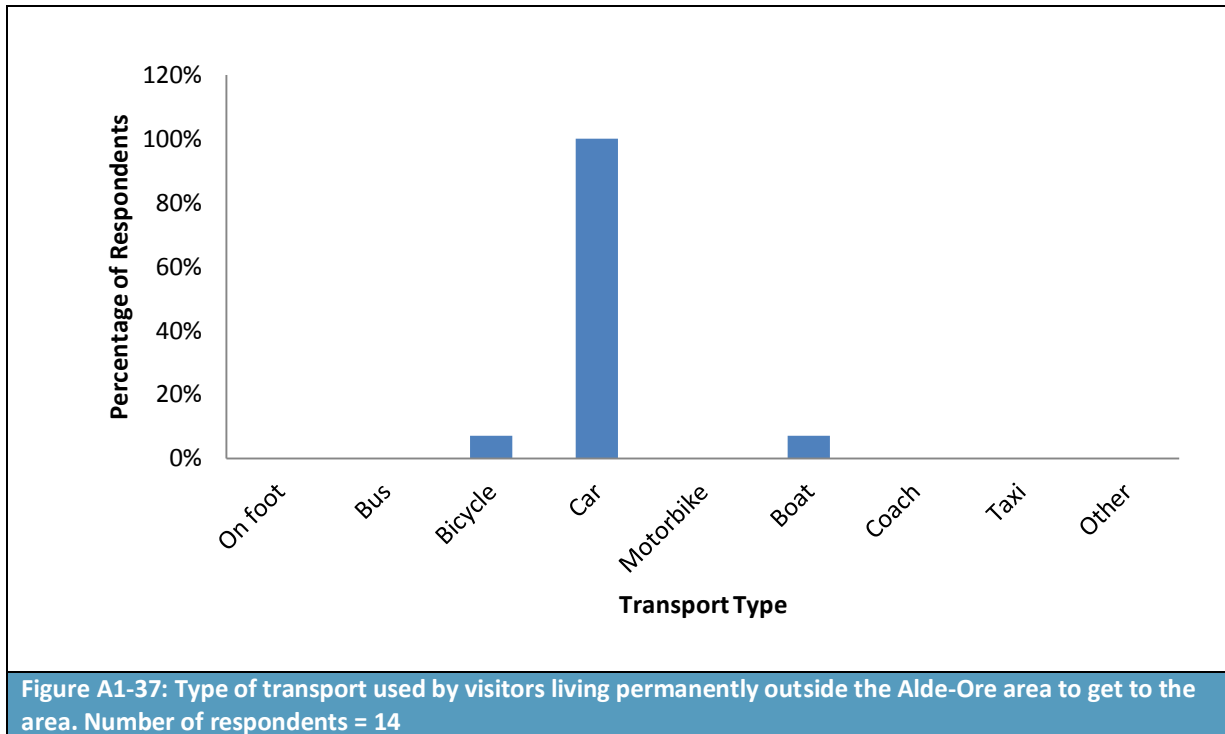
Other:

- Aldeburgh (2)
- Aldeburgh shopping (1)
- Food festivals (1)
- Golf (1)
- Born in Aldringham, love to visit what I still think of as 'home' (1)
- Longstanding family connection (1)

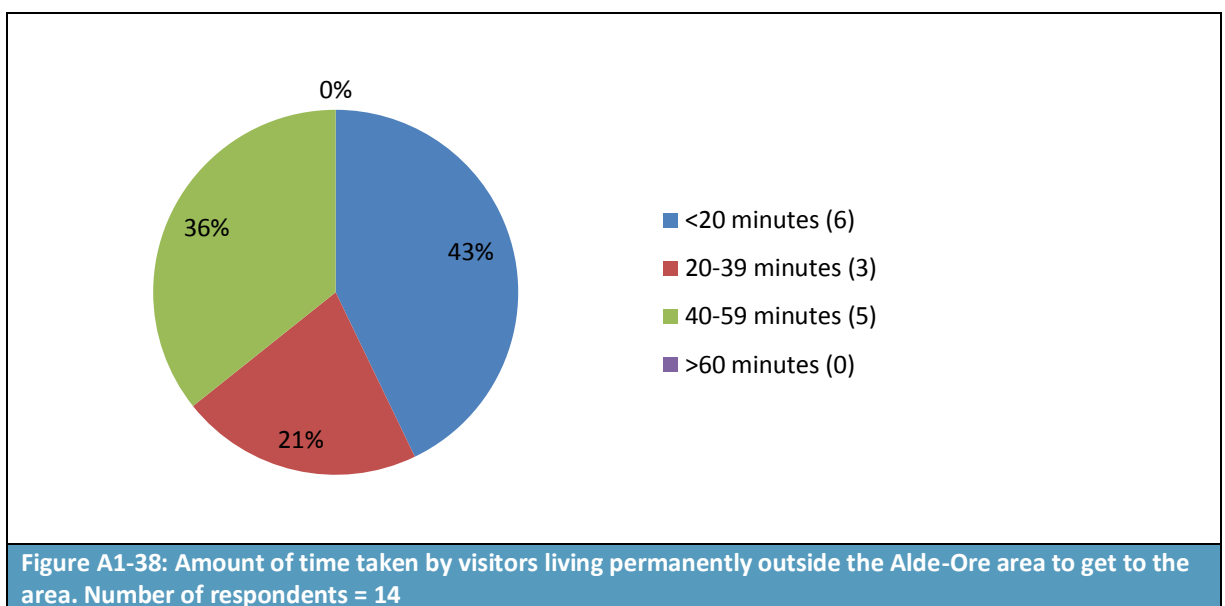
Question 37: How many people are accompanying you on your trip today?



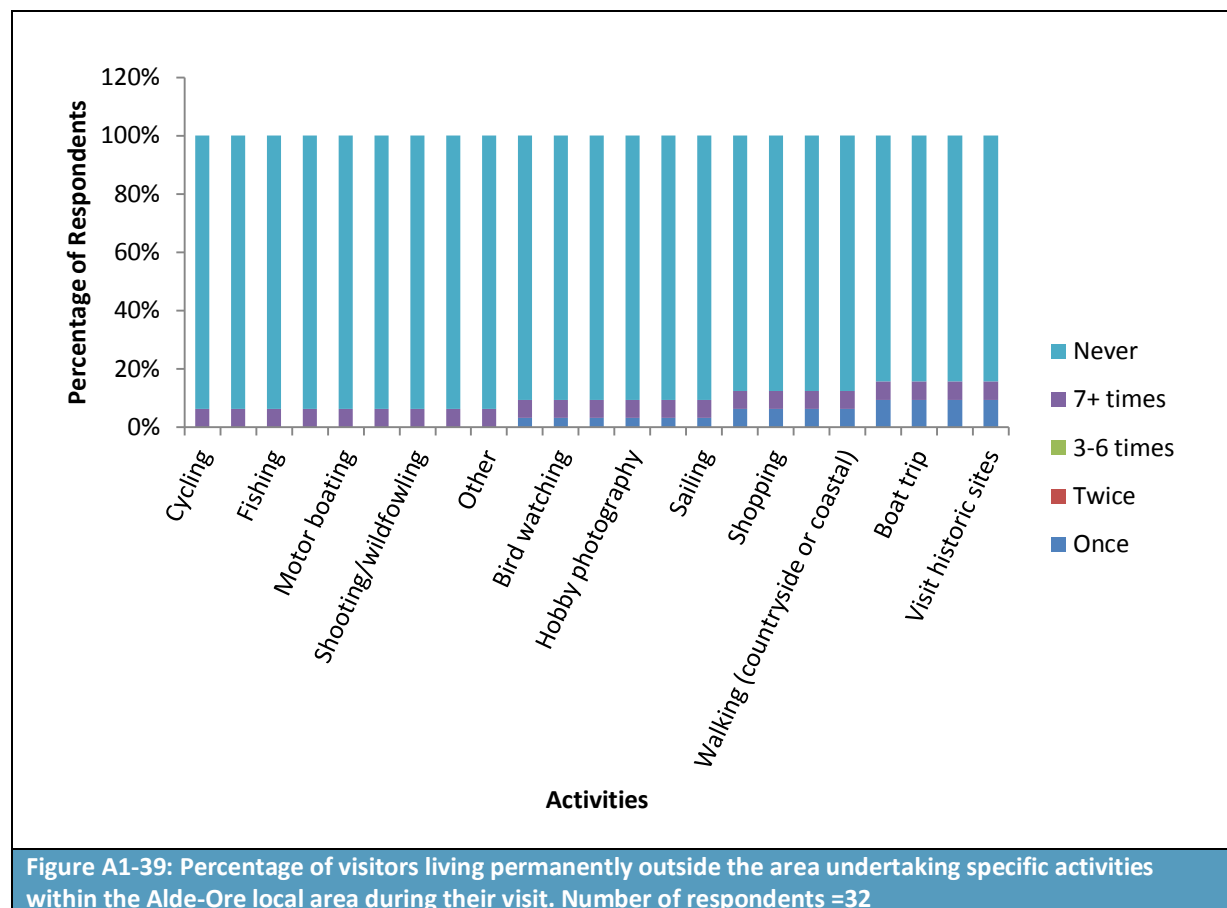
Question 38: How did you travel to the Alde-Ore local area today?



Question 39: How long did it take you to travel to the Alde-Ore local area today?



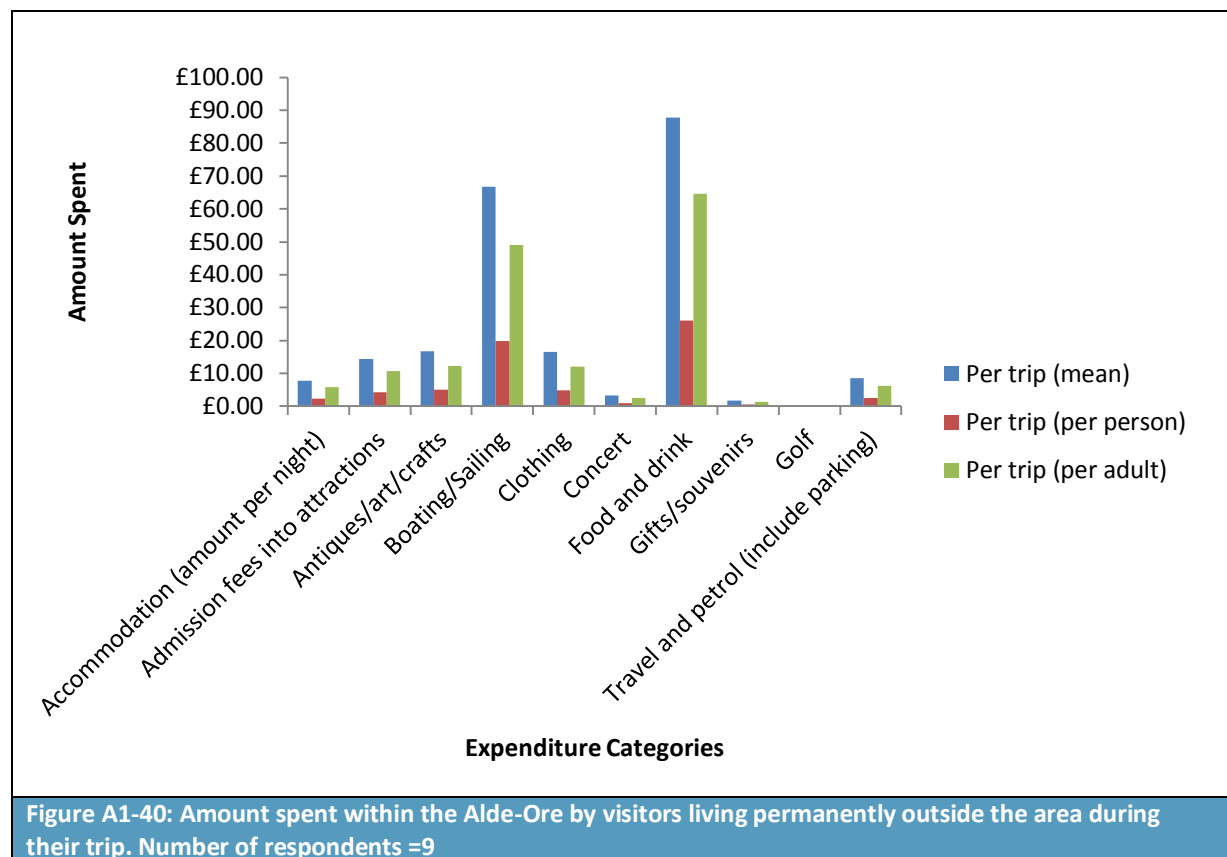
Question 40: How many times have you undertaken or do you intend to undertake the following activities in the Alde-Ore area on this visit?



Other:

- Cinema, 3-6 times [These are annual figures]

Question 41: Can you indicate how much your party has spent or is likely to spend WITHIN the Alde-Ore area TODAY on the following? (To the nearest £)



Question 42: What is the general location of your second home?

No answer given

Question 43: In what County or Country is your usual place of residence?

Beccles, Norfolk [only one respondent]

Question 44: On average how often do you visit the Alde-Ore local area annually?

This is a one off trip [only one respondent]

Question 45: How did you travel to the Alde-Ore local area today?

Car [only one respondent]

Question 46: How long did it take you to travel to the Alde-Ore local area today?

40-59 minutes [only one respondent]

Question 47: Which of the following factor/factors influenced your decision to visit the Alde-Ore local area?

Shopping/sightseeing [only one respondent]

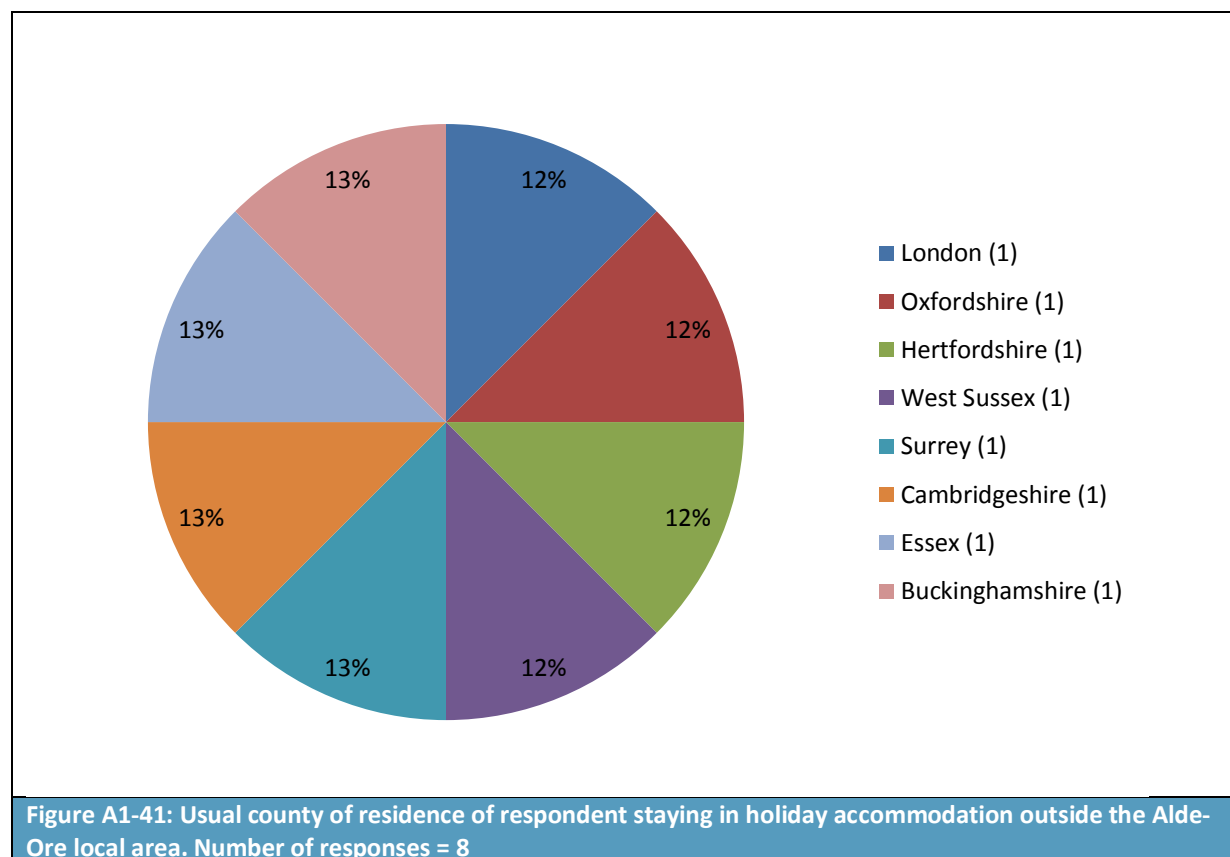
Question 48: How many times have you undertaken or do you intend to undertake the following activities in the Alde-Ore area on this visit?

Beach visit – Once; Bird watching – Once; Hobby photography – Once; Shopping – Once; Sightseeing – Once; Walking (countryside or coastal) – Once; Other (Crab buying) [only one respondent]

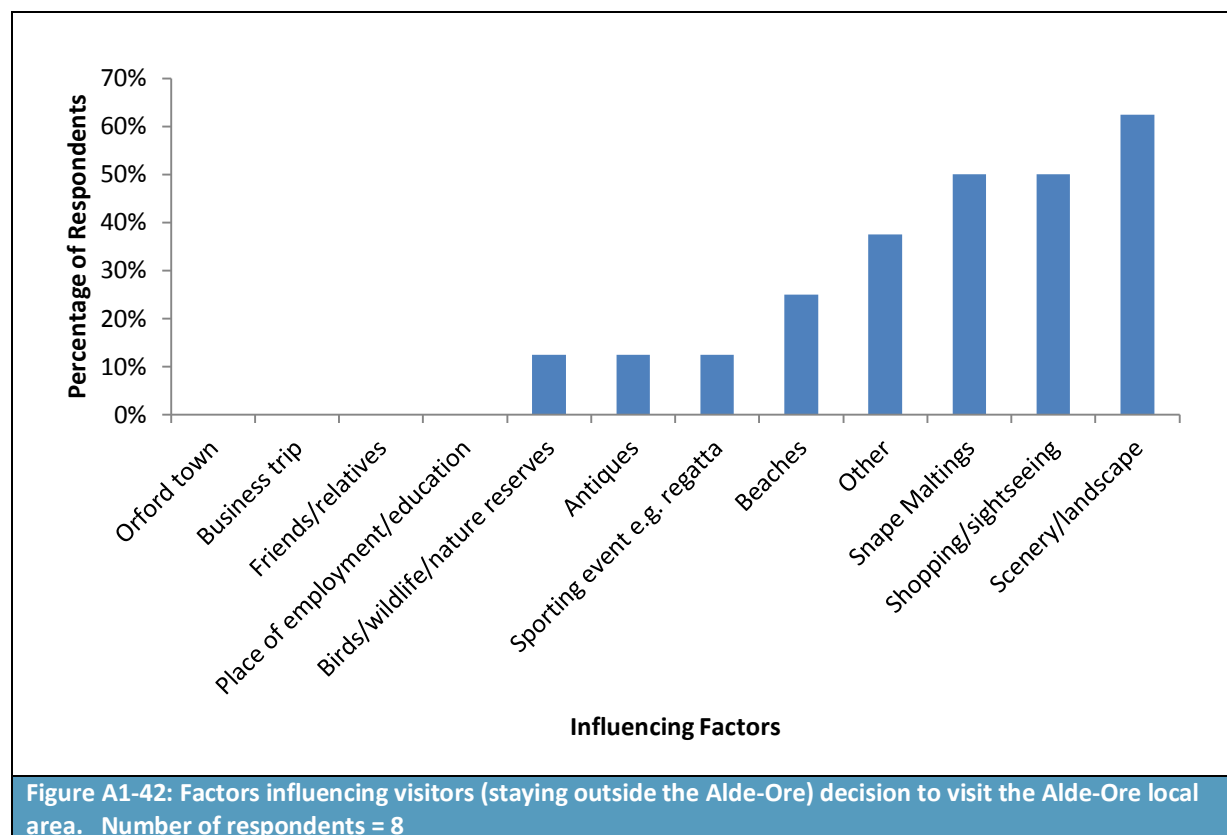
Question 49: Can you indicate how much your party has spent or is likely to spend in the Alde-Ore area TODAY on the following? (To the nearest £)

Table Error! No text of specified style in document.A1-10: Spend during day trip to Alde-Ore local area [only one respondent]	
Category	Amount spent
Food and drink	£10
Travel and petrol (include parking)	£17
Other - Crab	£20

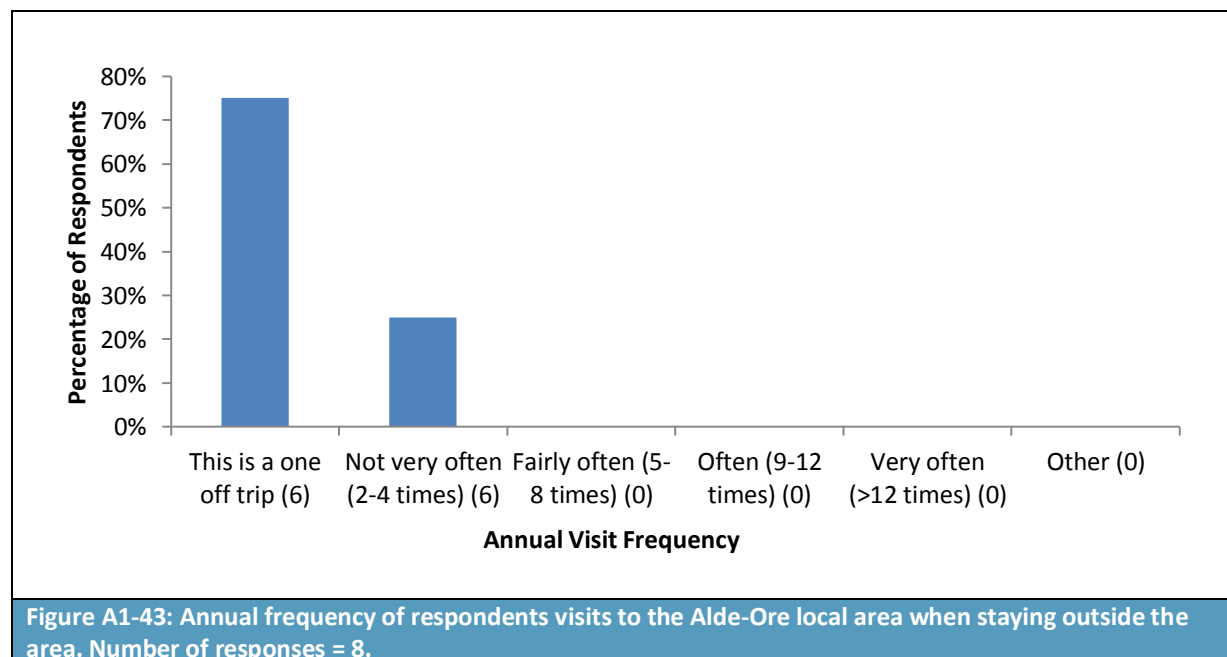
Question 50: In what County or Country is your usual place of residence?



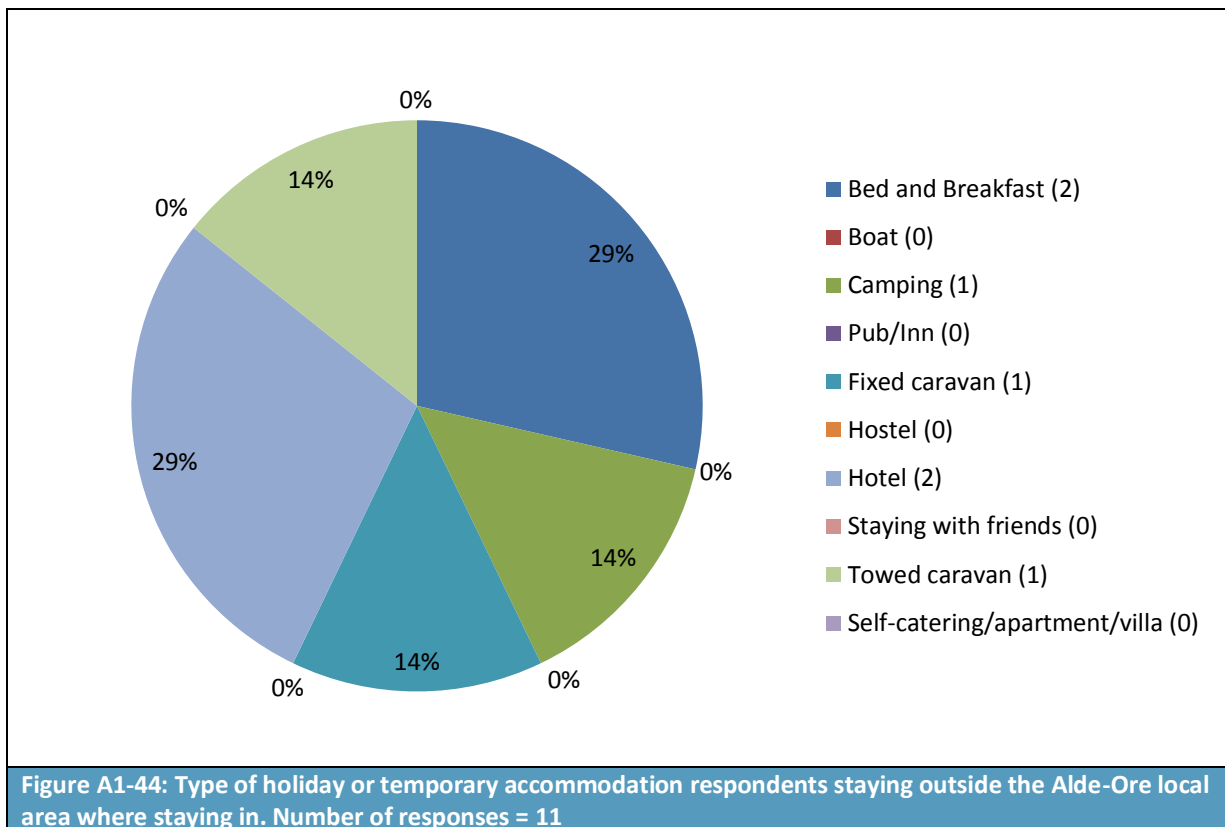
Question 51: Which of the following factor/factors influenced your decision to visit the Alde-Ore local area?



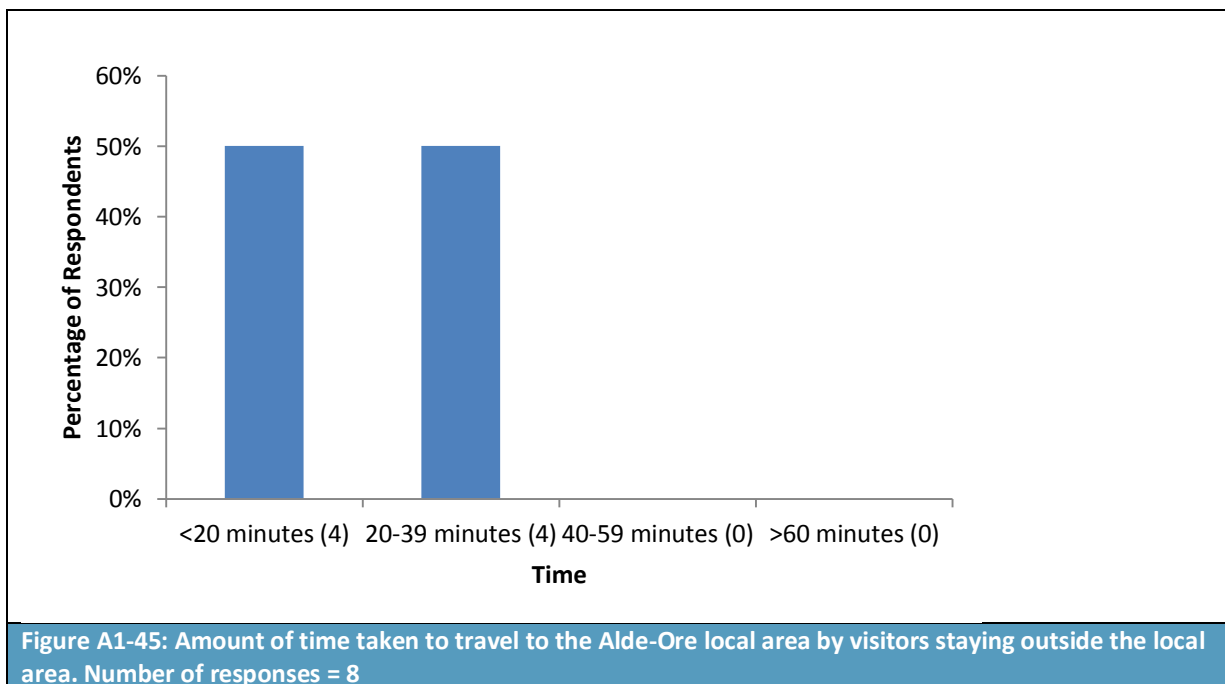
Question 52: On average how often do you visit the Alde-Ore local area annually?



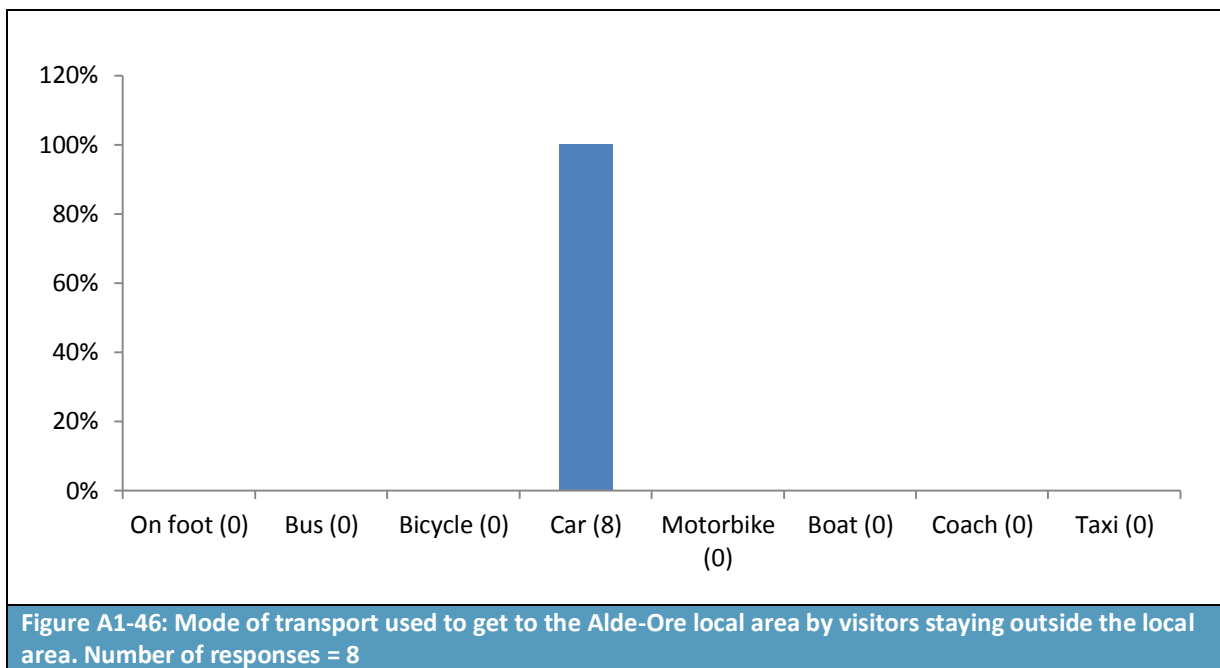
Question 53: What type of holiday or temporary accommodation are you staying in today?



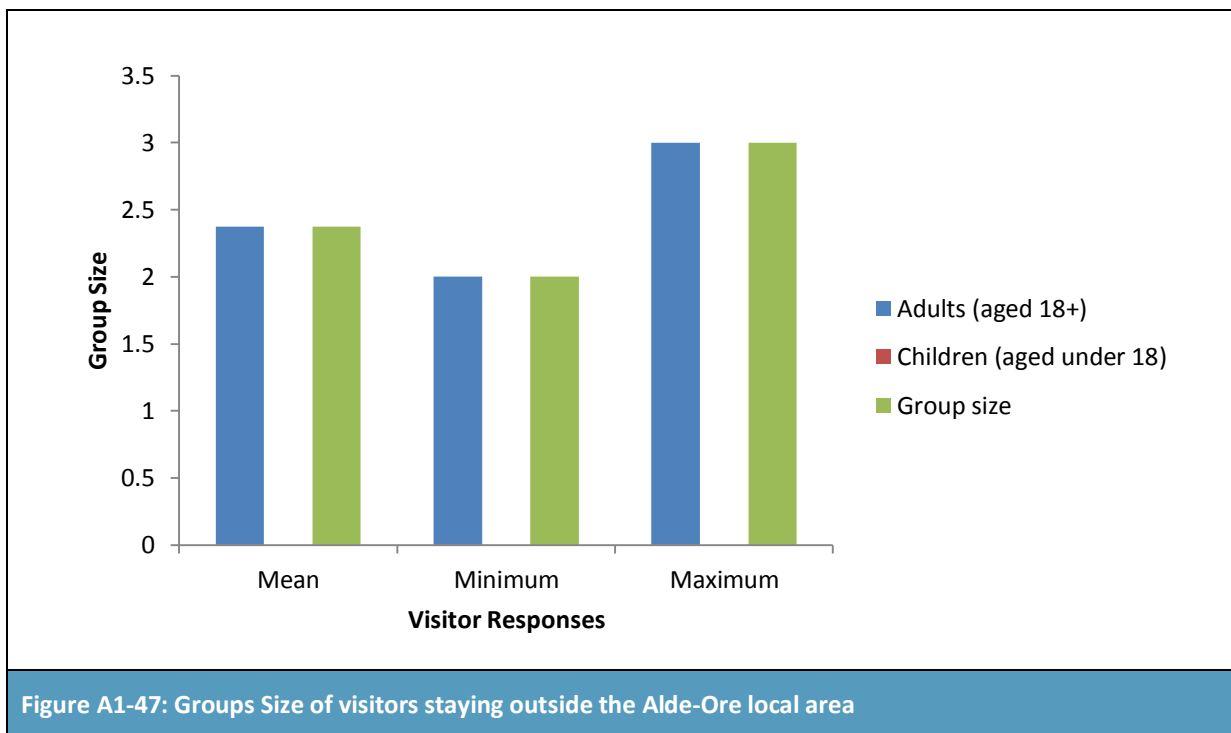
Question 54: How long did it take you to travel to the Alde-Ore local area today?



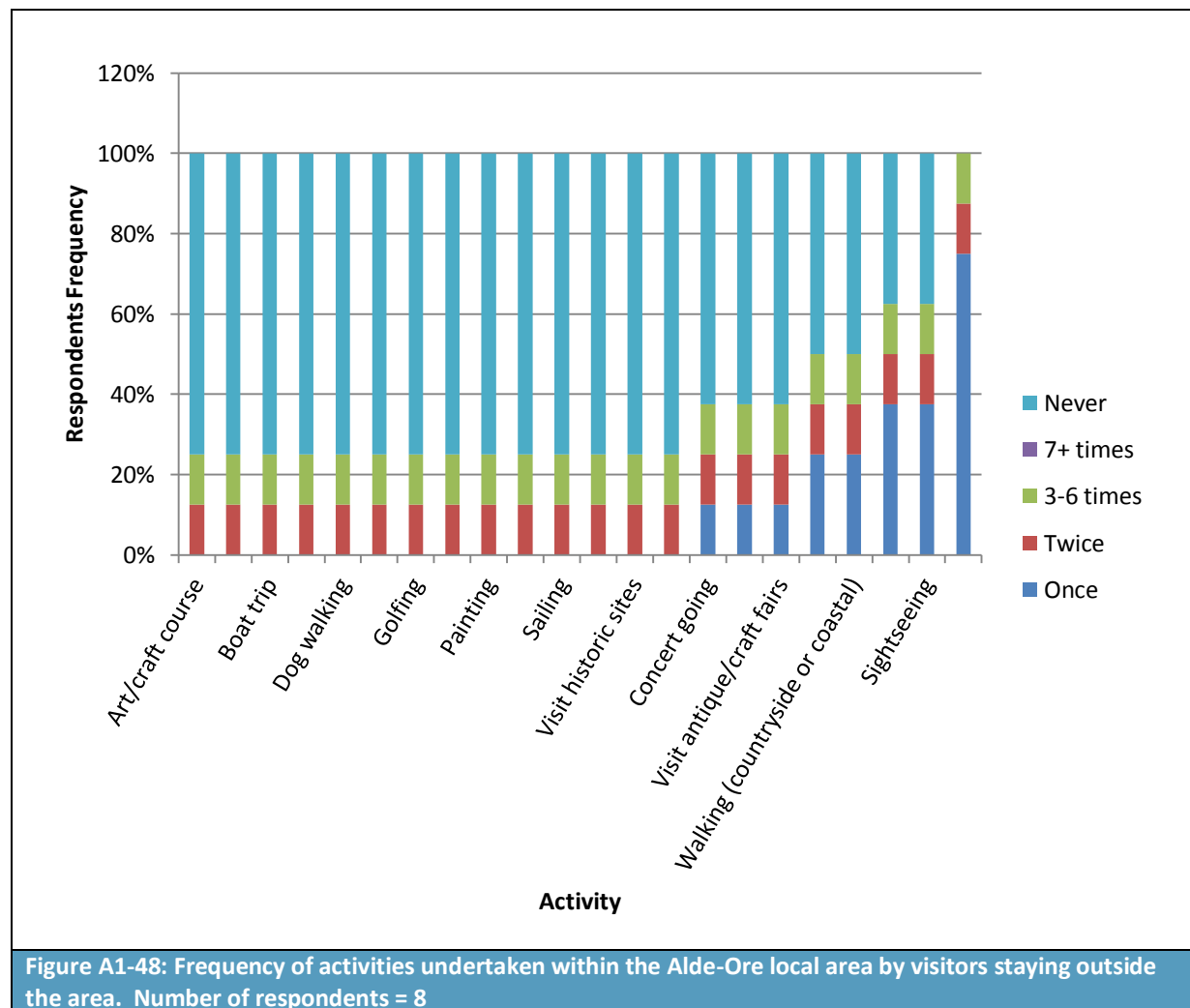
Question 55: How did you travel to the Alde-Ore local area today?



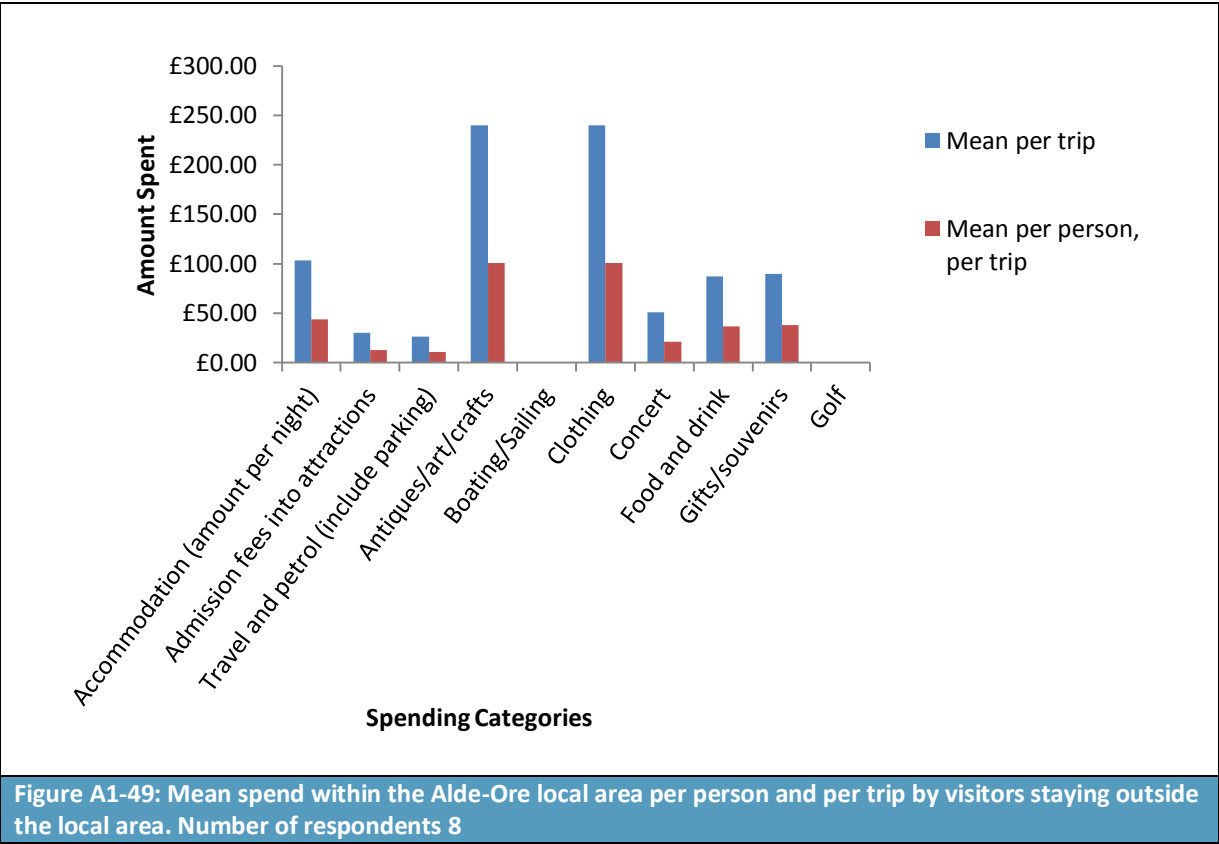
Question 56: How many people are accompanying you on your trip today?



Question 57: How many times have you undertaken or do you intend to undertake the following activities in the Alde-Ore area on this trip?

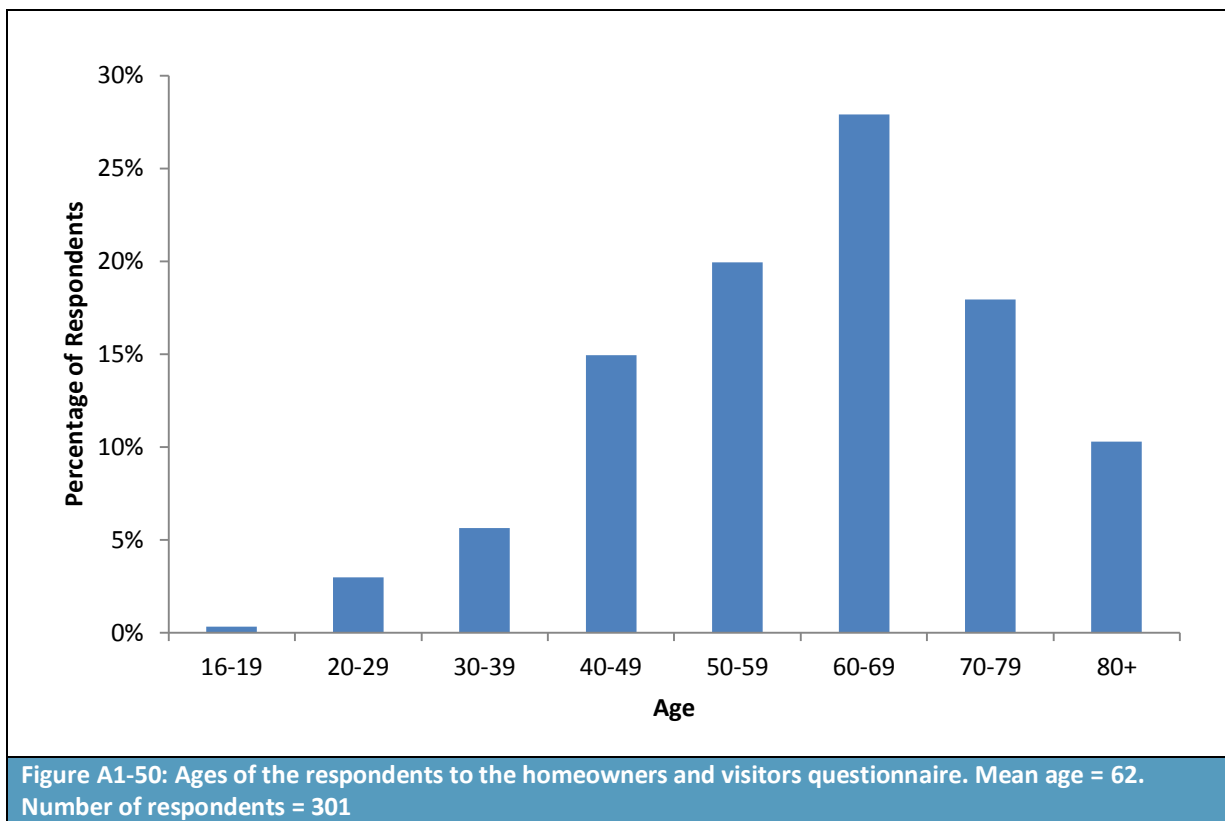


Question 58: Can you indicate how much your party has spent or is likely to spend in the Alde-Ore area TODAY on the following? (To the nearest £)



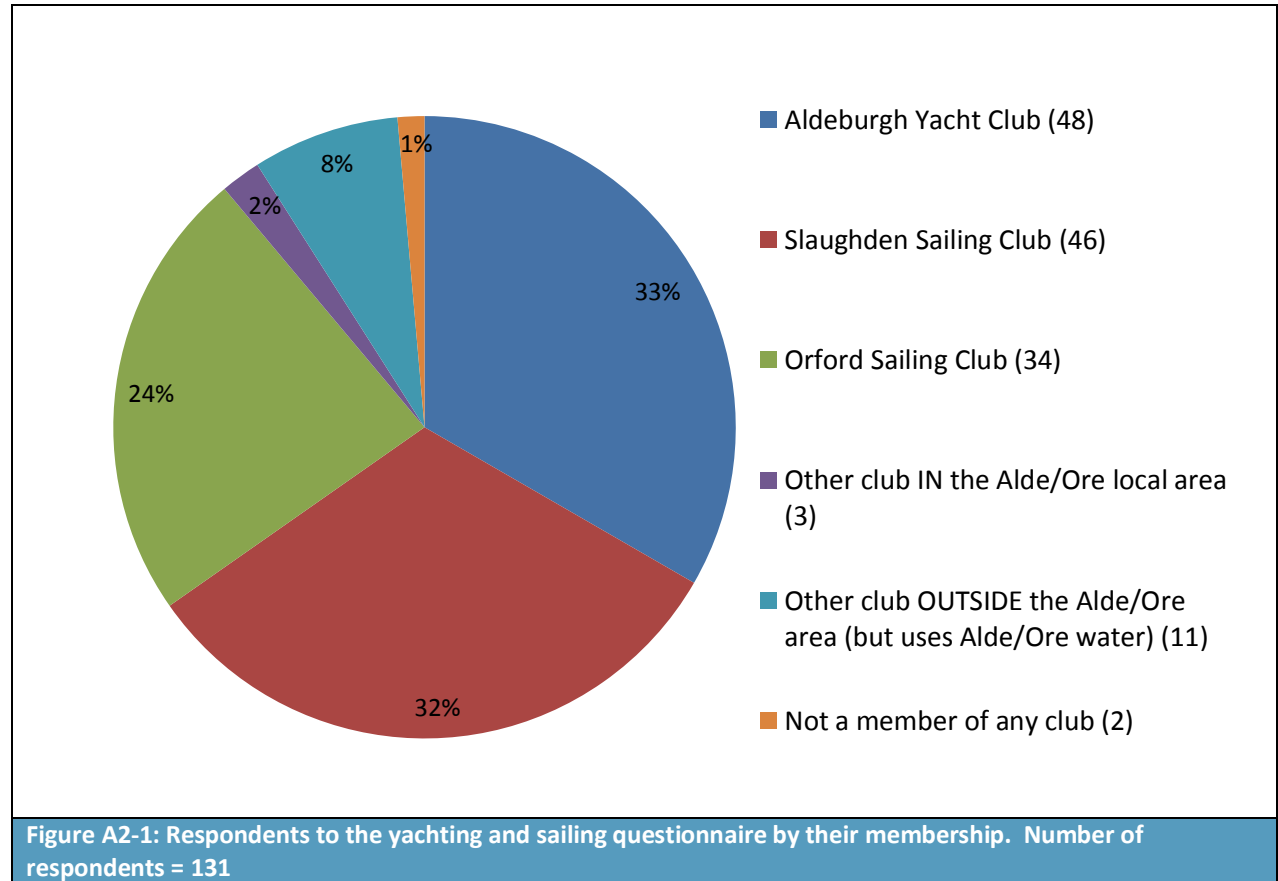
No responses to Questions 59-65.

Question 67: Please indicate your age

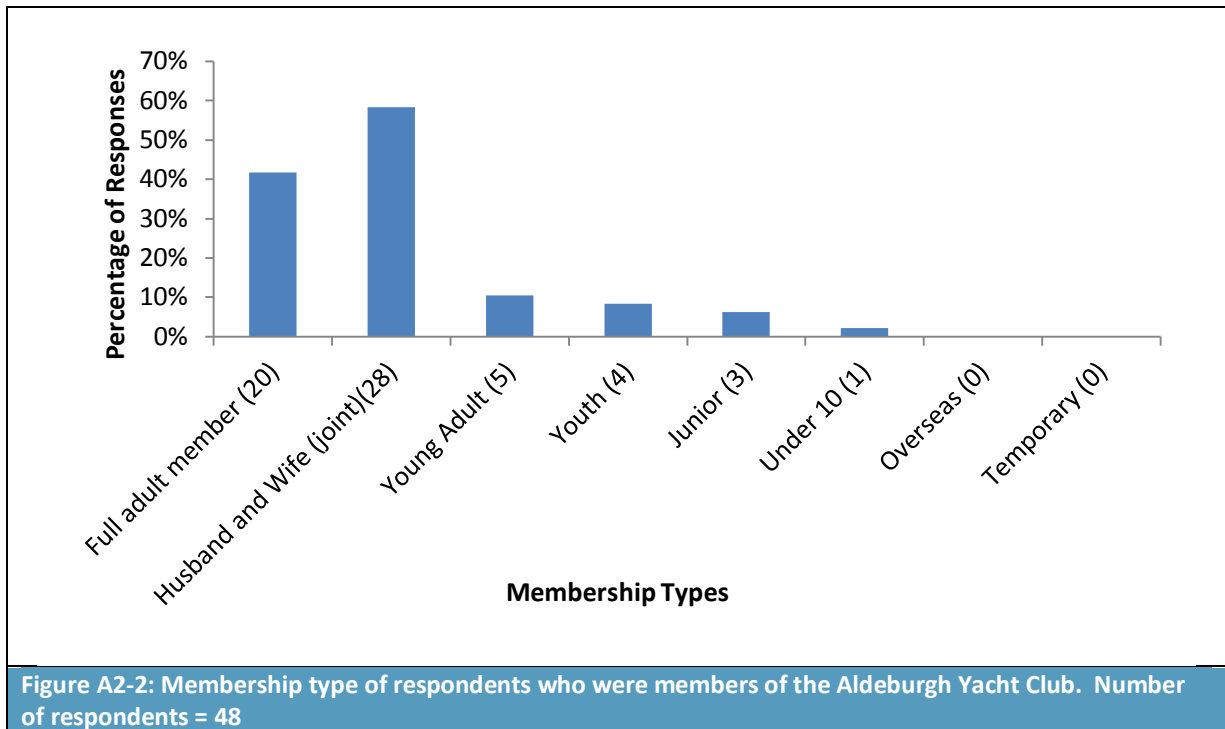


Annex 3 Yachting and Sailing Questionnaire Analysis

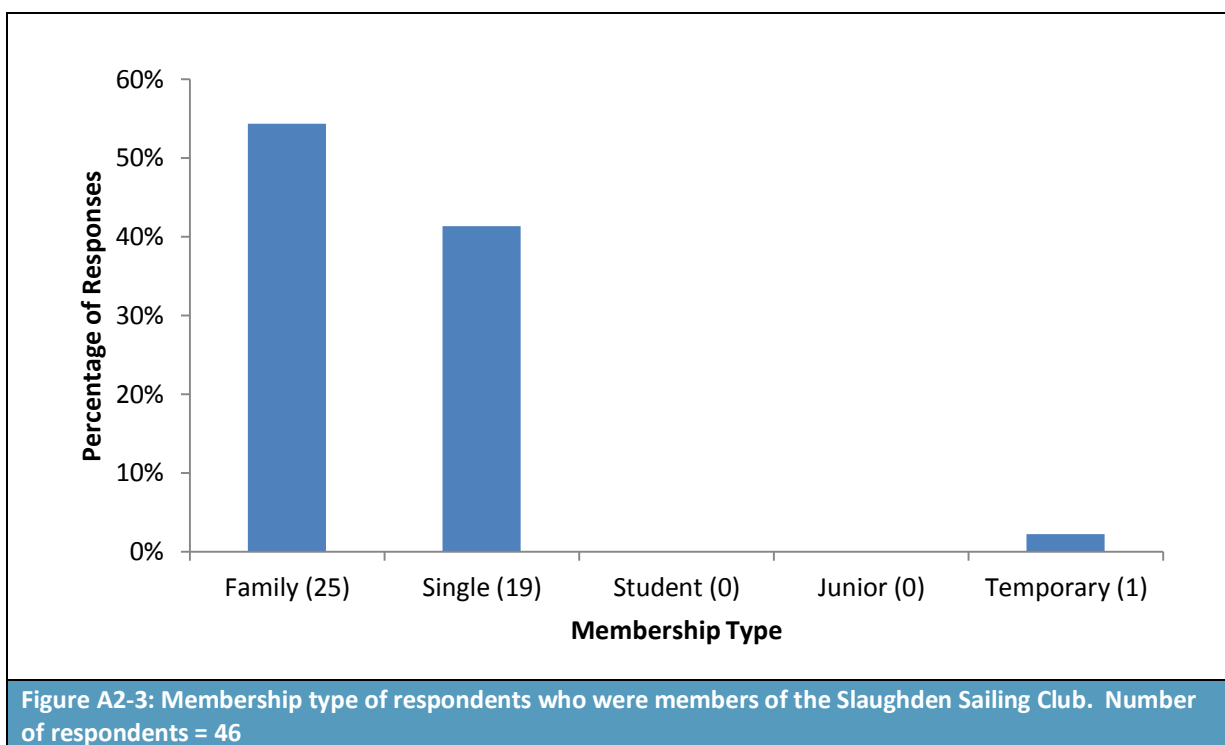
Question 1: Are you and/or your family a member of any of the following clubs?



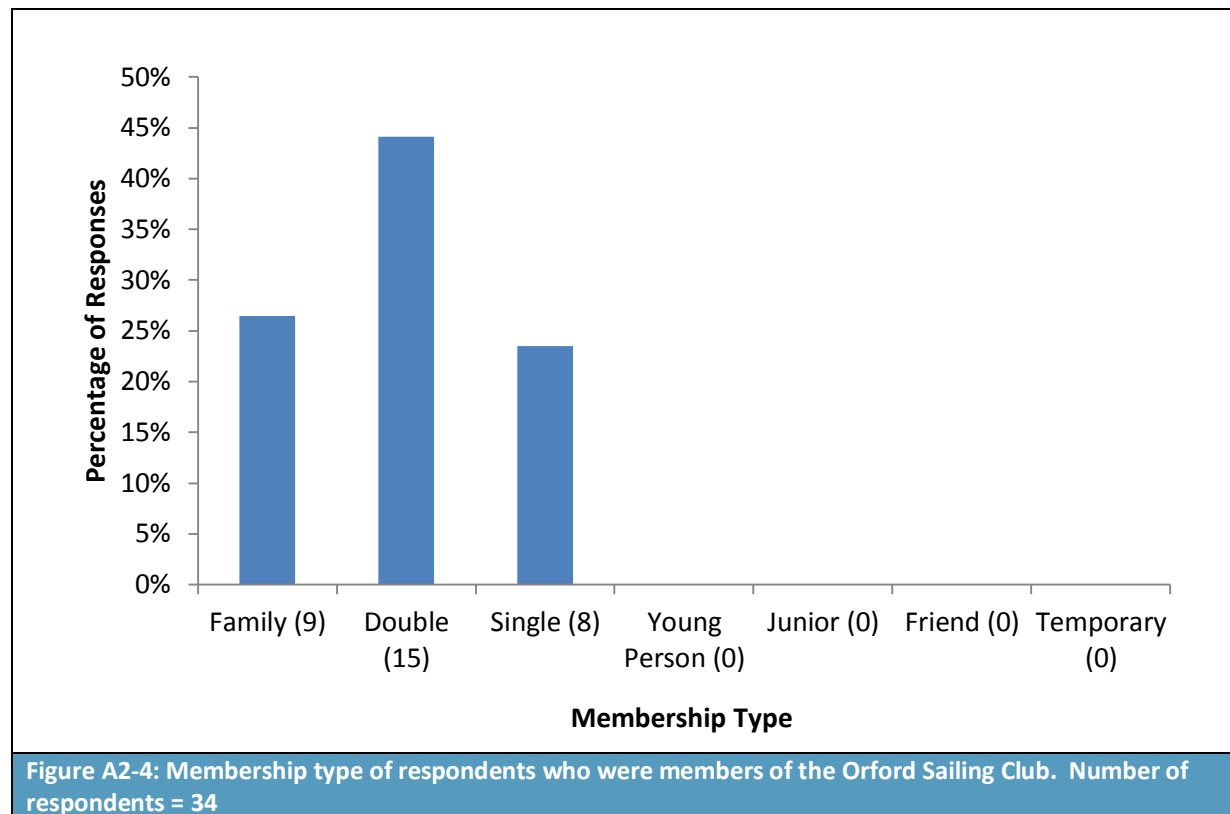
Question 2: Which of the following Aldeburgh Yacht Club memberships do you and/or your family hold?



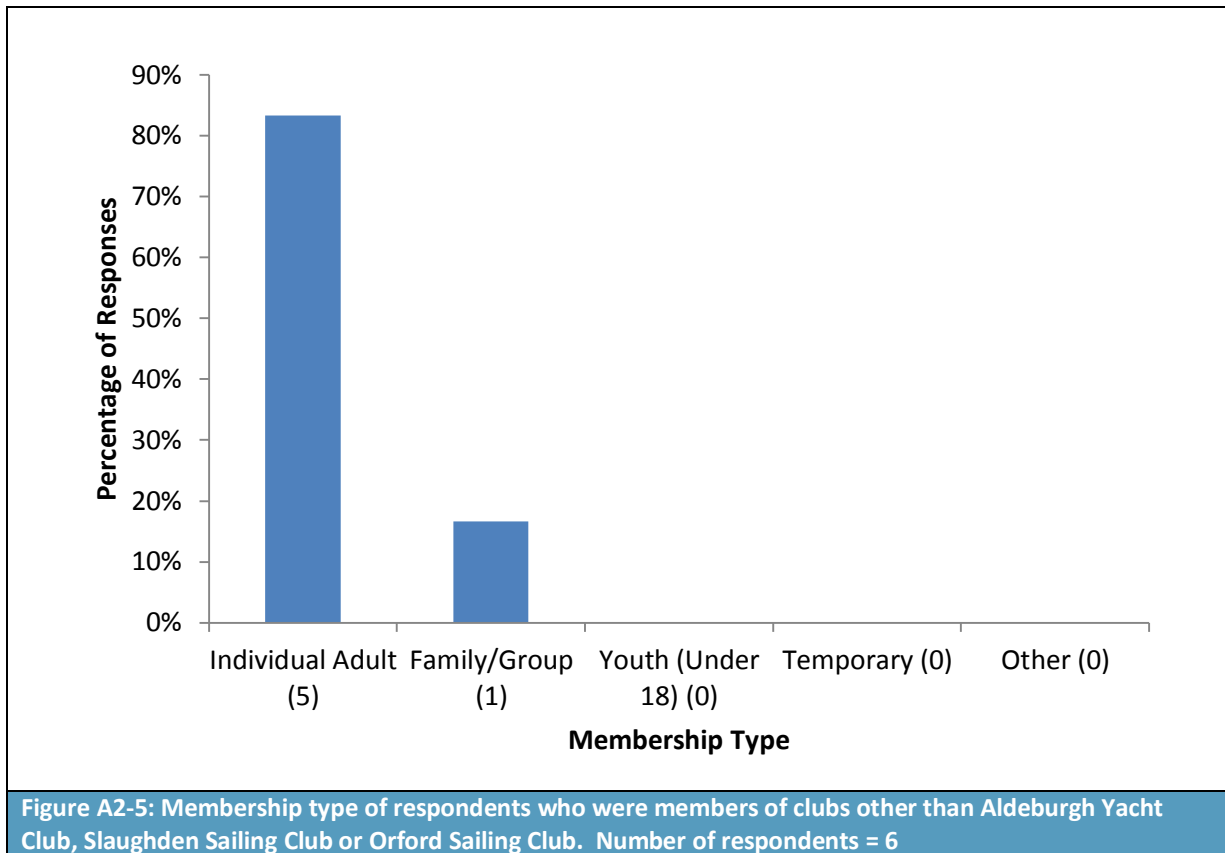
Question 3: Which of the following Slaughden Sailing Club memberships do you and/or your family hold?



Question 4: Which of the following Orford Sailing Club memberships do you and/or your family hold?



Question 5: Which of the following memberships do you and/or your family hold (where you are not members of Aldeburgh Yacht Club, Slaughden Sailing Club or Orford Sailing Club)?



Question 6: If part of a family/group membership, how many adults and children are included?

Table A2-1: Number of adults and children in group memberships. Number of respondents = 62		
Category	Mean	Total
Adults (18+)	2.2	134
Children 12 – 18 years	0.4	24
Children under 12 years	0.6	38
Family size	3.2	-

Question 7: Do you or your family/group own any of the following?

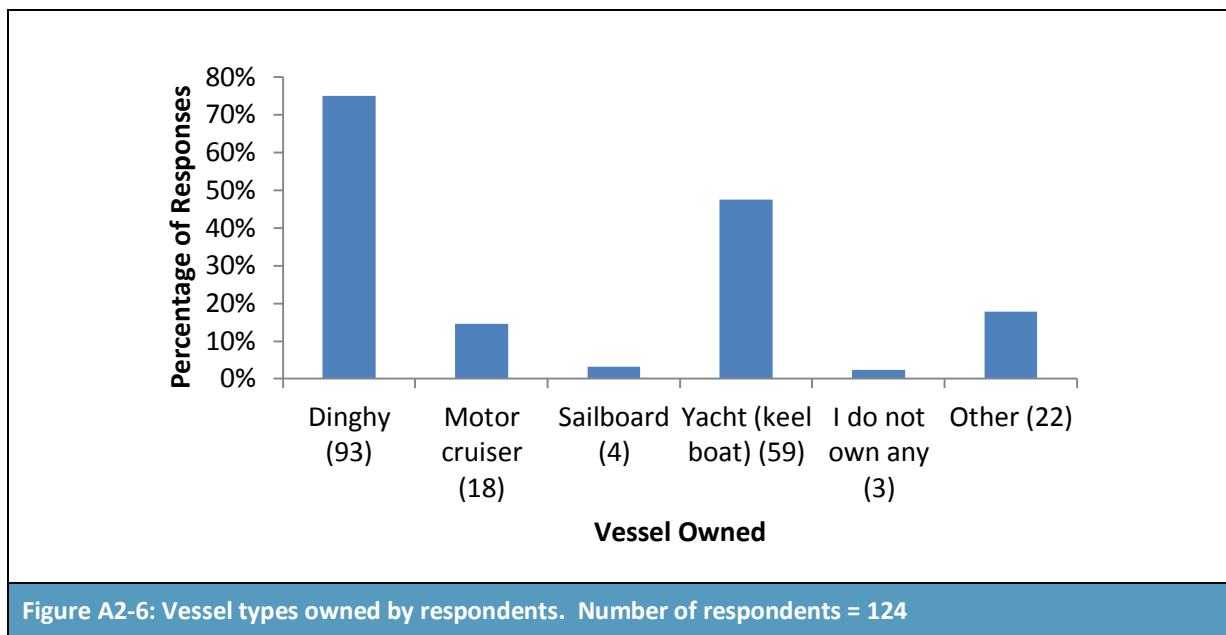


Table A2-2: Vessels owned by respondents listed under "Other". Respondents = 20

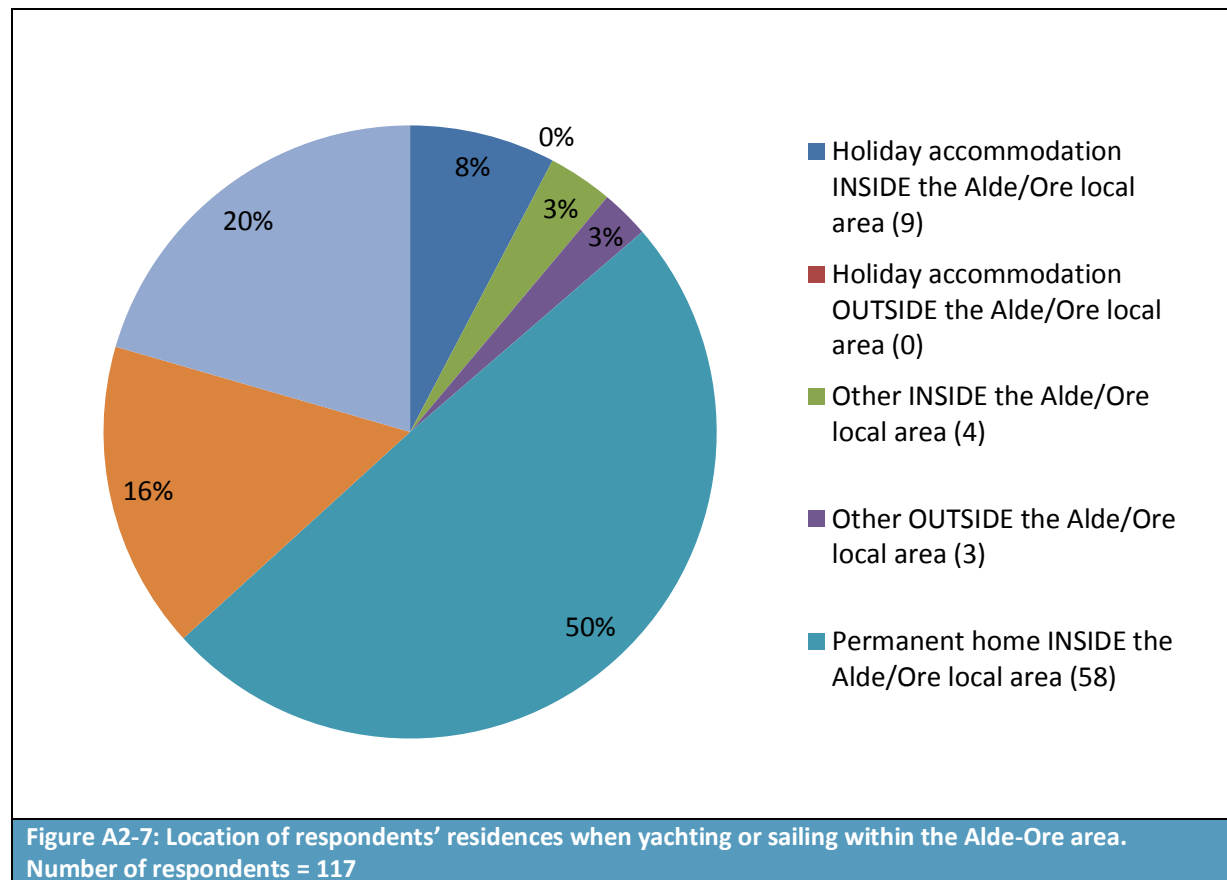
Vessel Type	Number Owned by Respondents
Yacht	4
Rib	3
Cornish Shrimper	2
Rubber Tender	3
K6 Sport boat	1
Kayak	4
Dinghy	9
Canoe	3
Motor Boat	2
Motor Launch	1

Question 8: Where is your boat moored?

Table A2-3: Vessels mooring location. Respondents = 98

Place of mooring	Number of Responses
Slaughden	31
Orford	23
Aldeburgh	21
Other	14
River Alde	4
n/a	3
River Ore	2
Ipswich	1
Denmark	1
River Orwell	1
Woodbridge	1

Question 9: Where are you normally resident when involved in yachting and/or sailing activities WITHIN the Alde-Ore local area?



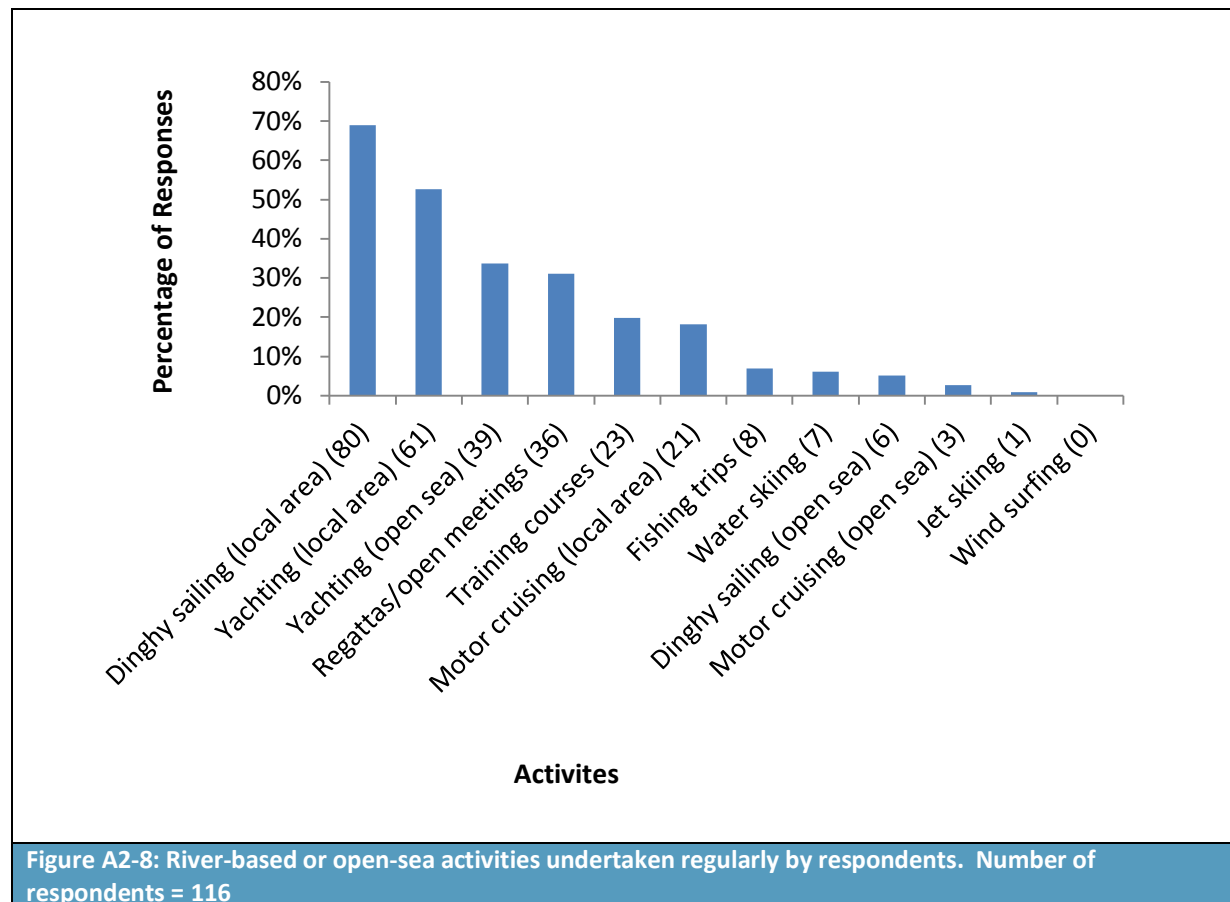
Question 10: Approximately how many days a year do you spend sailing IN the Alde-Ore area?

Table A2-4: Number of days spent sailing by respondents in the Alde-Ore area. Number of respondents = 117		
Mean	Minimum	Maximum
40	0	350

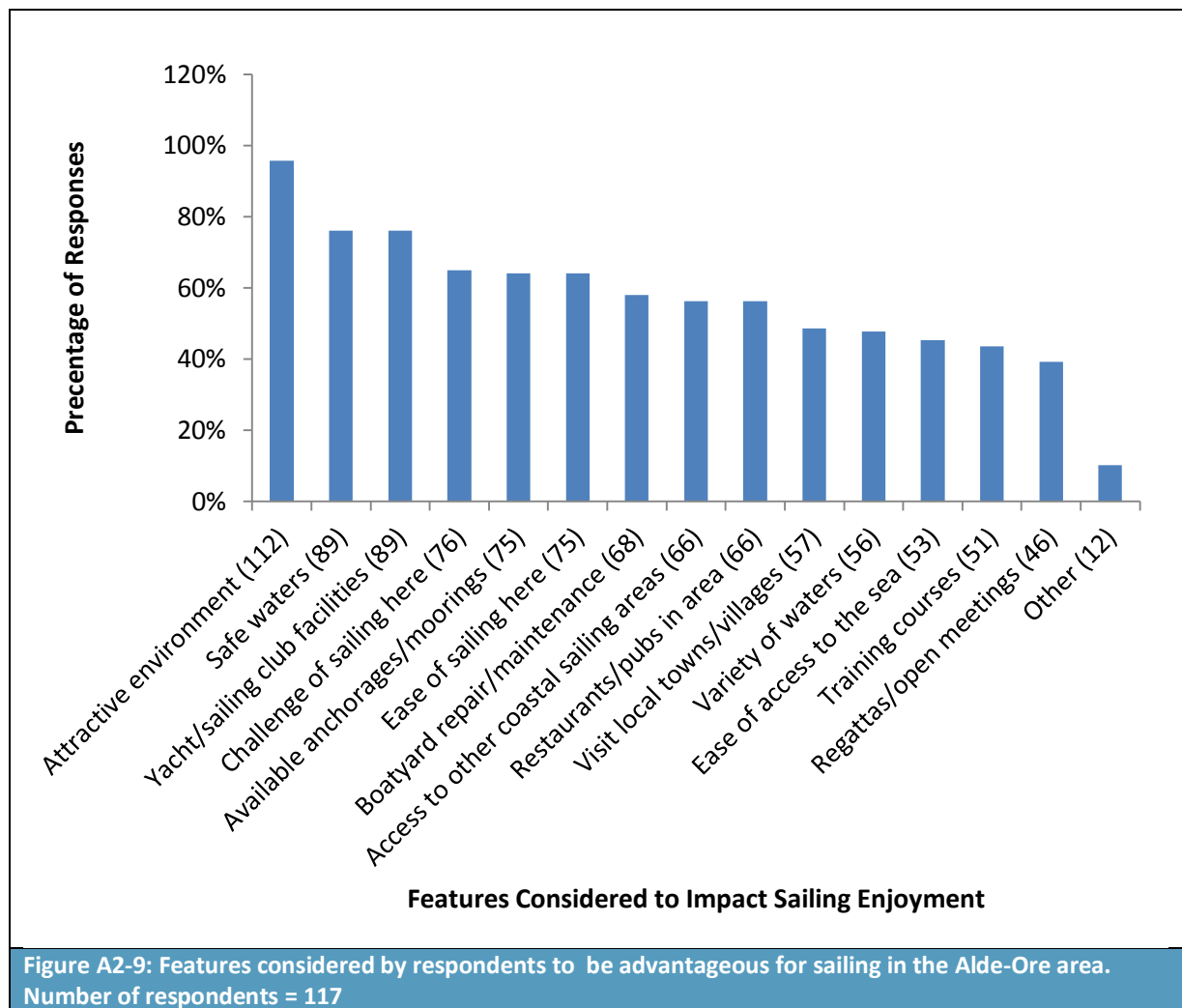
Other:

- Varies
- In the past, 40-50
- 35 -40
- 70 Days
- 14-21
- 3 to 4
- 30 for each family member
- 6 to 8
- 30plus
- varies enormously year by year, perhaps 6 on average
- formerly about 20 - Injury now precludes participation

Question 11: Which of the following river-based or open-sea activities do you regularly (6+ times in a year) take part in?



Question 12: Do you consider any of the following an advantage for sailing IN the Alde-Ore area?



Other:

- Music
- Beauty of the river, especially bird life
- Local community's relationship with the water users
- Fantastic wildlife
- Slip ways and trailer parking
- I live here
- No speed limits in main rivers
- Bird watching and seal watching are facilitated from boats
- With SSC largely local residential sailing community
- Historical sites. Wildlife: birds, seals, dolphins etc.
- Sailing in the tidal waters of the Alde at Aldeburgh offers a diversity not found in lake or open water sailing. It develops particular seamanship qualities.

Question 13: Can you indicate how much your household is likely to spend over an average YEAR WITHIN the Alde-Ore local area on the following whilst partaking in sailing activities? (To the nearest £)

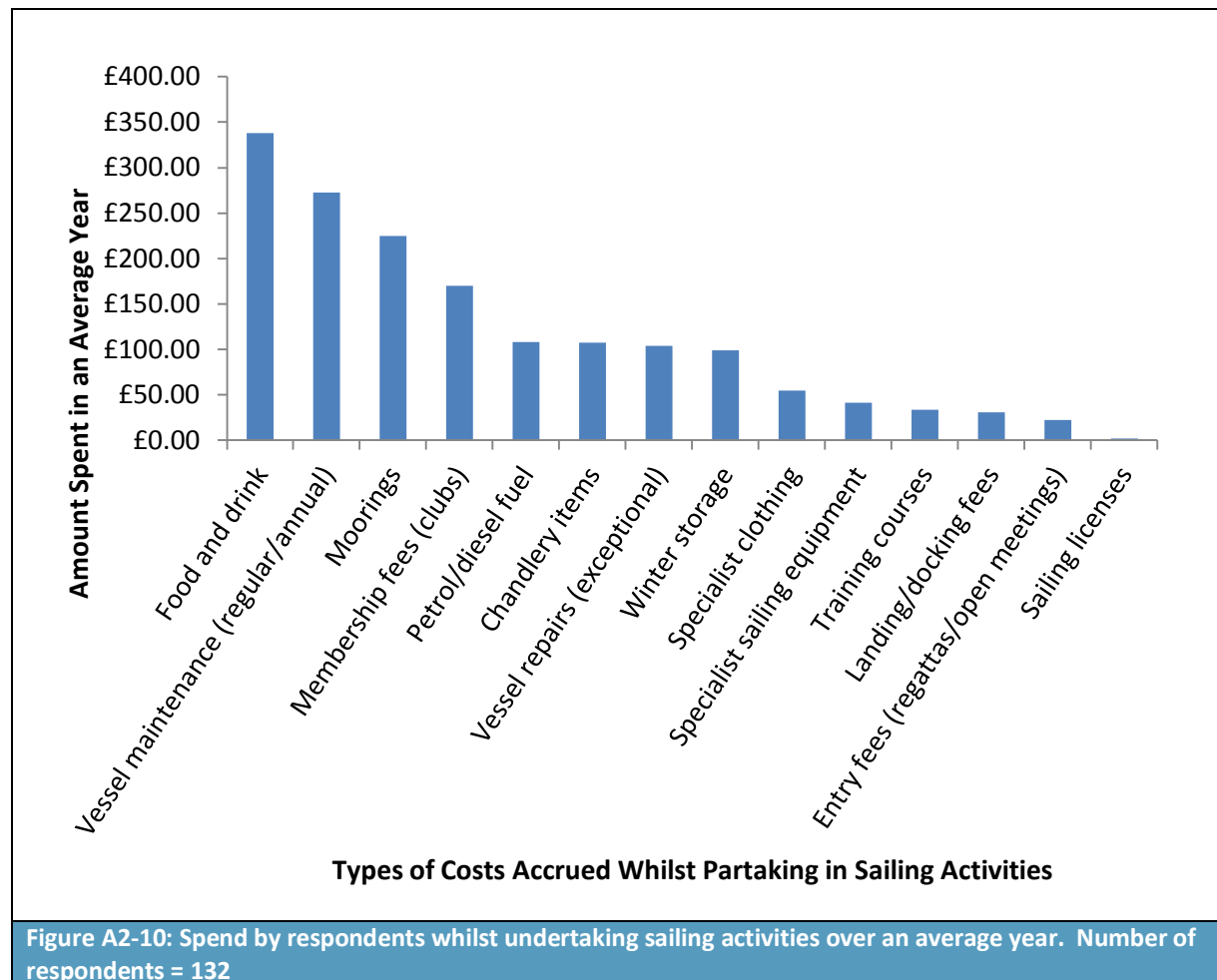


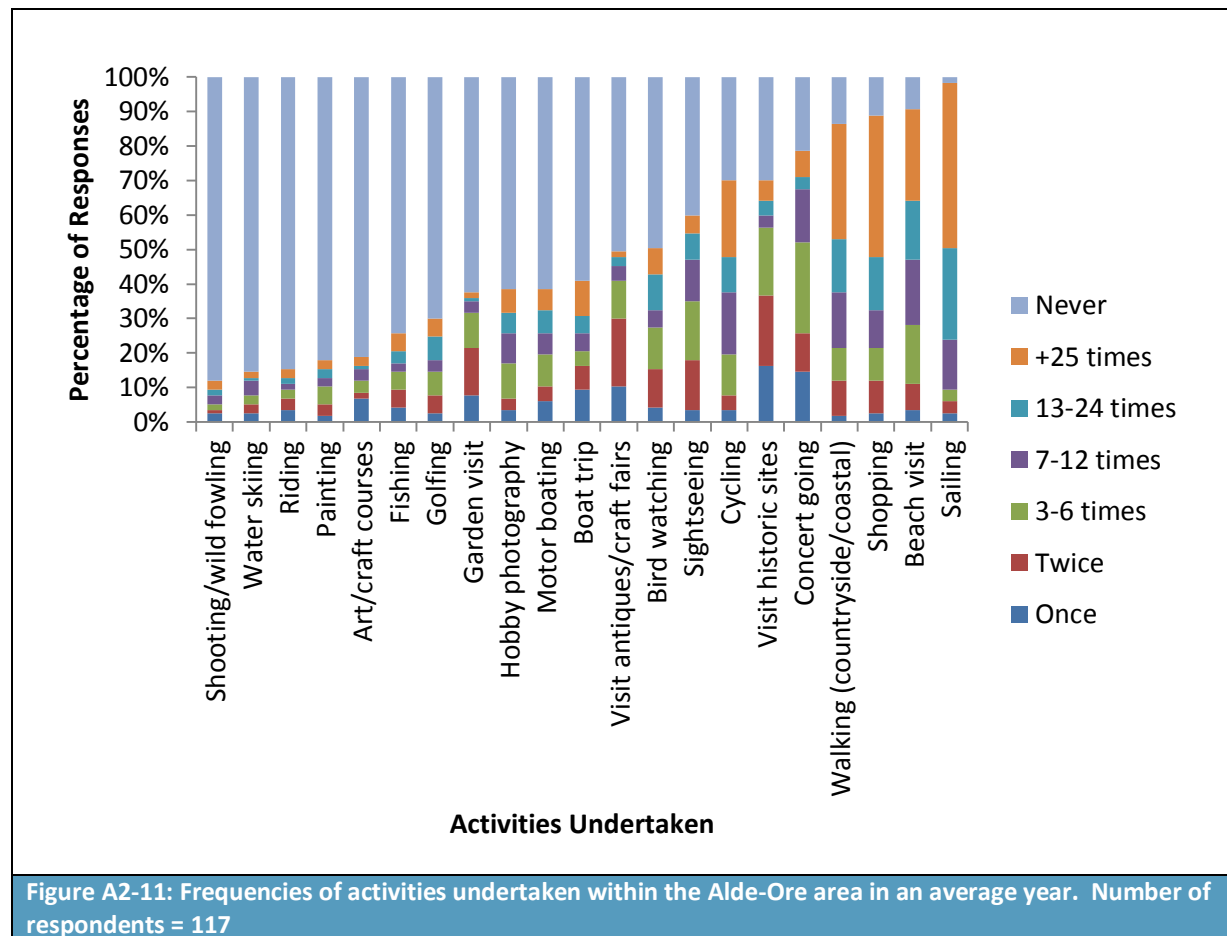
Table A2-5: Spend by respondents whilst undertaking sailing activities over an average year. Number of respondents = 132

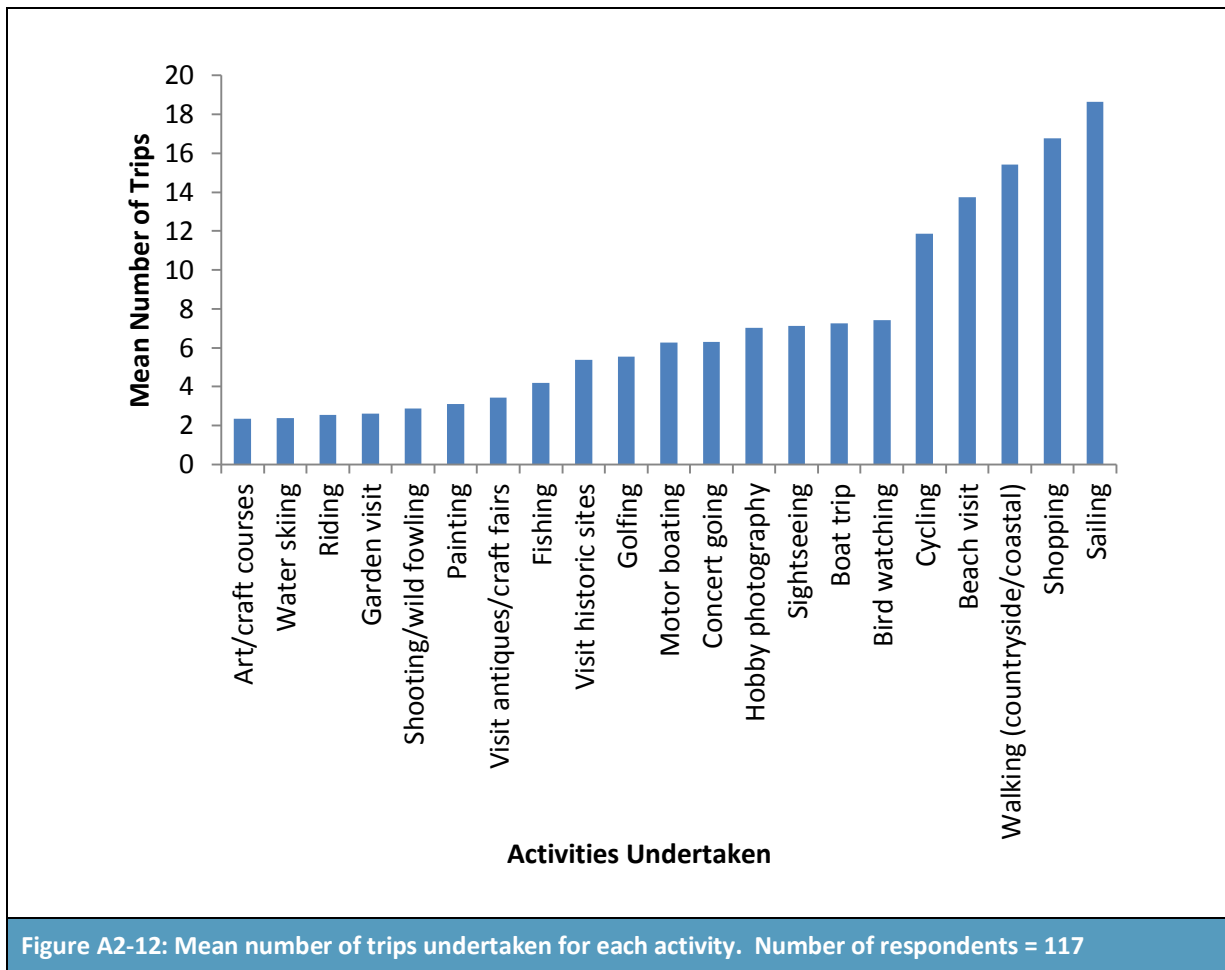
Category	Mean	Minimum	Maximum
Food and drink	£337.80	£0.00	£3,500.00
Vessel maintenance (regular/annual)	£272.65	£10.00	£3,000.00
Moorings	£224.85	£0.00	£1,200.00
Membership fees (clubs)	£170.36	£0.00	£600.00
Petrol/diesel fuel	£108.18	£0.00	£3,000.00
Chandlery items	£107.65	£0.00	£1,200.00
Vessel repairs (exceptional)	£104.17	£0.00	£6,500.00
Winter storage	£99.28	£0.00	£1,600.00
Specialist clothing	£54.96	£0.00	£500.00
Specialist sailing equipment	£41.65	£0.00	£500.00
Training courses	£33.90	£0.00	£600.00
Landing/docking fees	£30.95	£0.00	£500.00
Entry fees (regattas/open meetings)	£22.31	£0.00	£300.00
Sailing licenses	£1.88	£0.00	£153.00

Other:

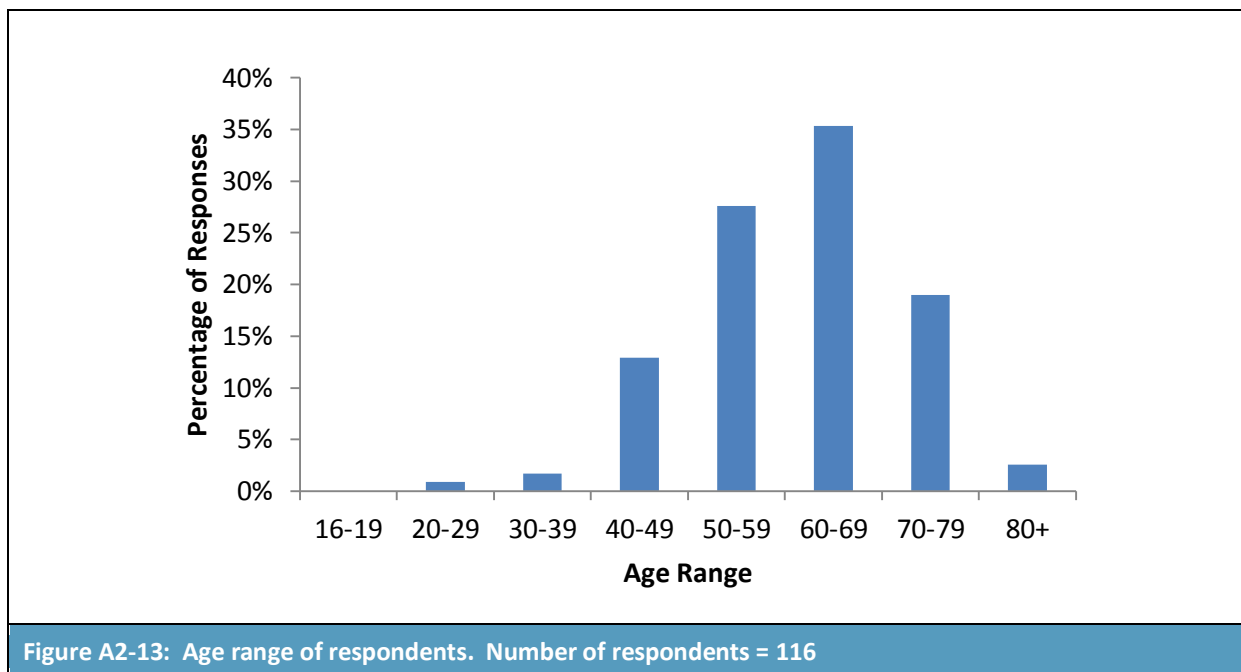
- Food, newspapers £1,000
- No idea to the nearest £
- Dinghy parking £70.00

Question 14: How often do you undertake the following activities WITHIN the Alde-Ore area in an average year?



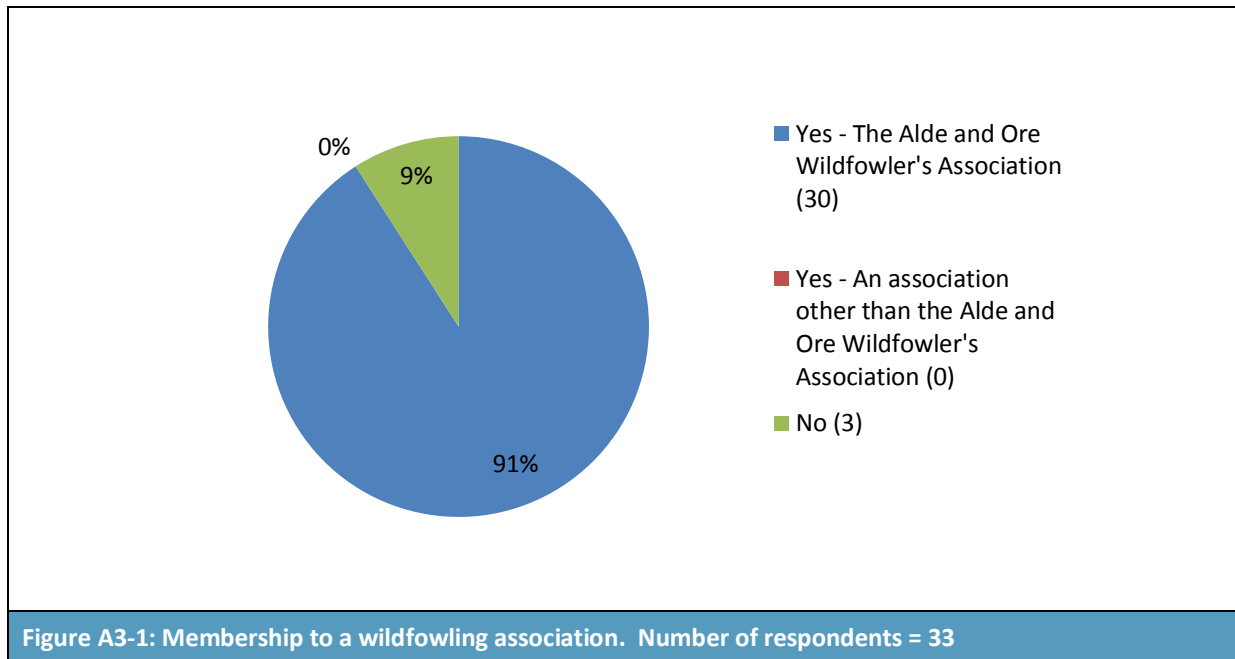


Question 15: Please indicate your age

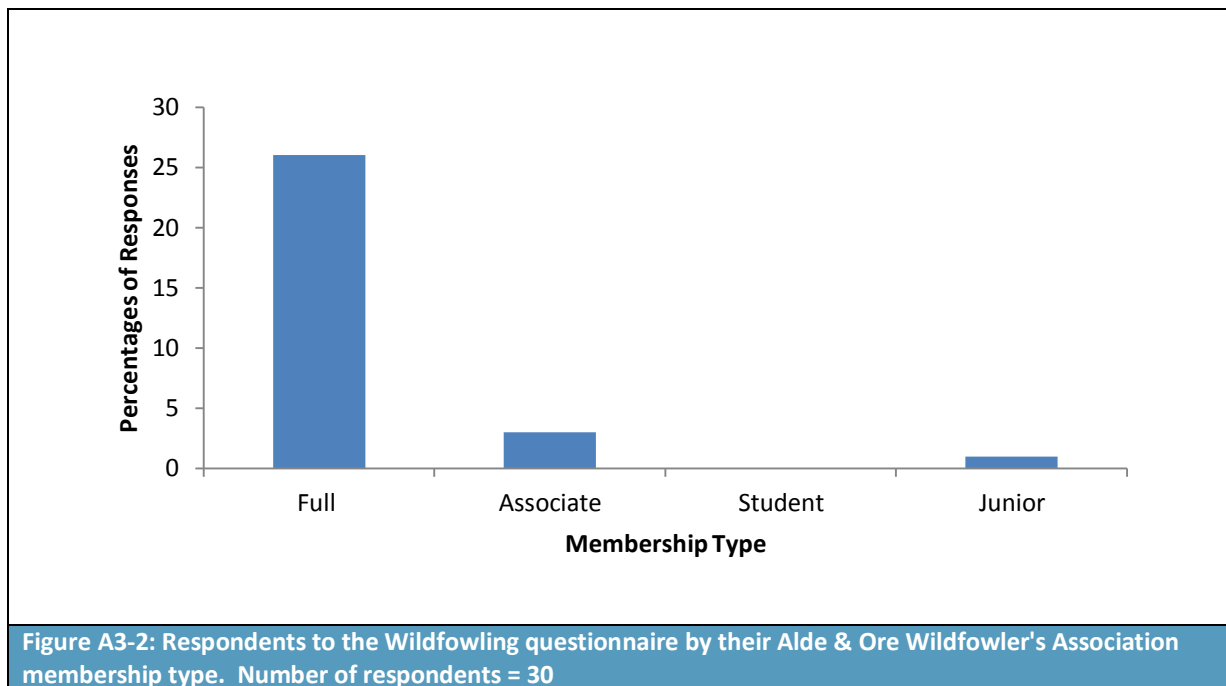


Annex 4 Wildfowlers Questionnaire Analysis

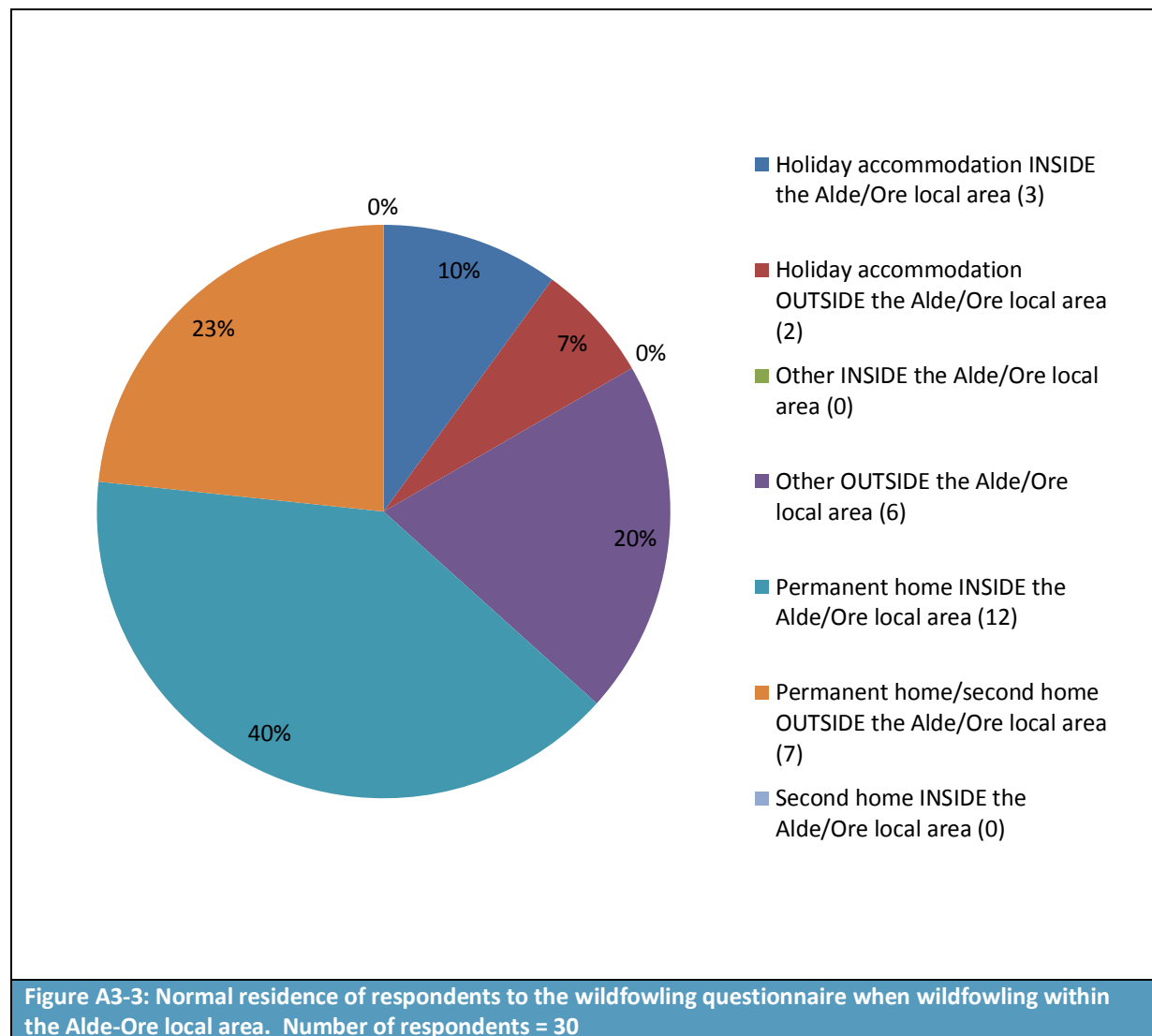
Question 1: Are you a member of a wildfowling association?



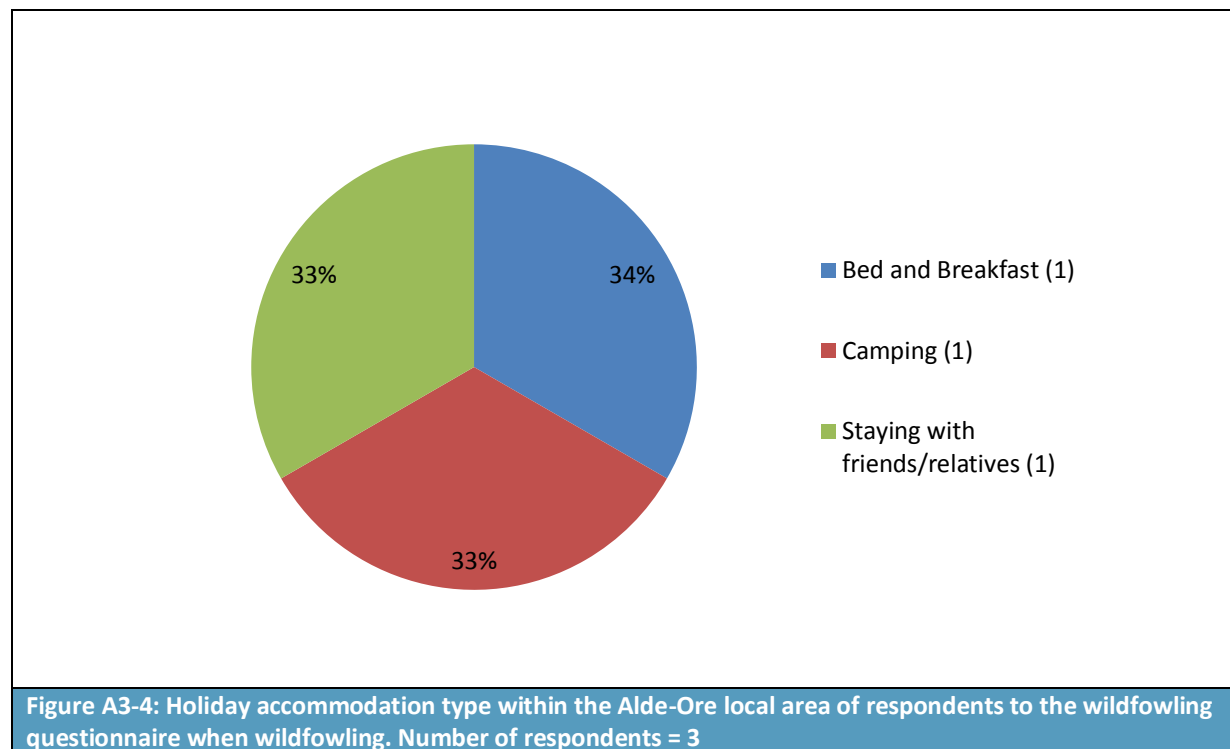
Question 2: What type of Alde & Ore Wildfowler's Association club membership do you currently have?



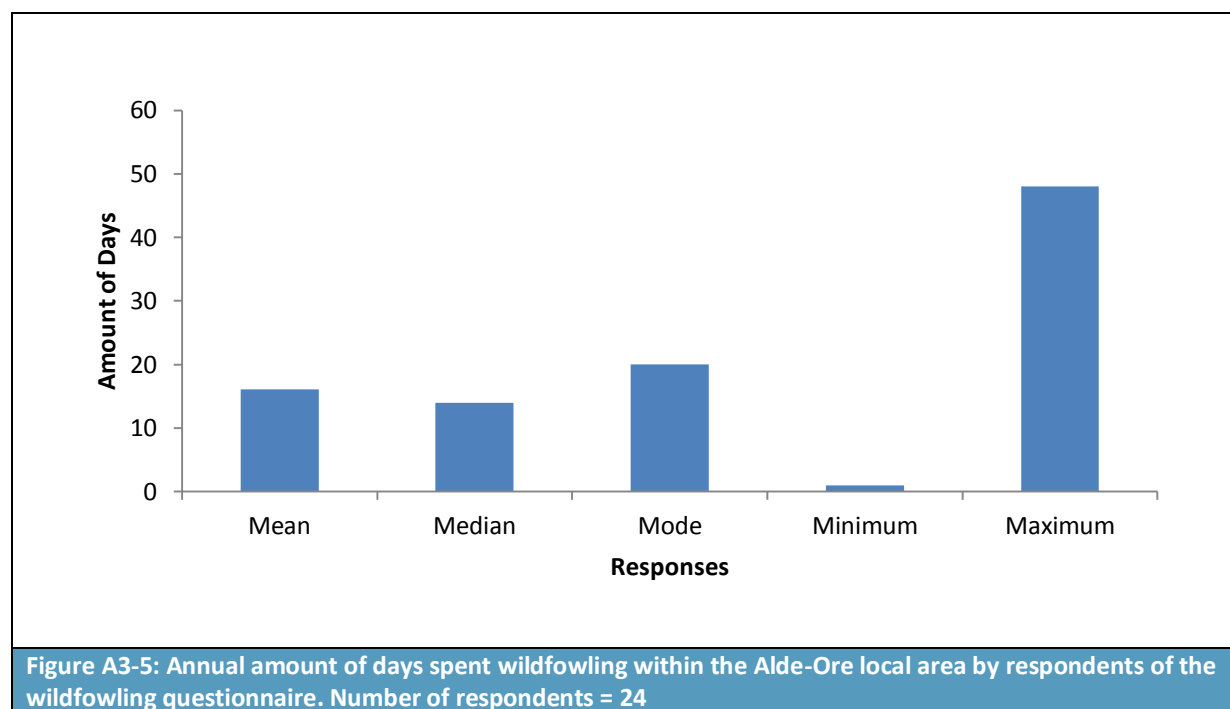
Question 3: Where are you normally resident when involved in wildfowling activities WITHIN the Alde-Ore local area?



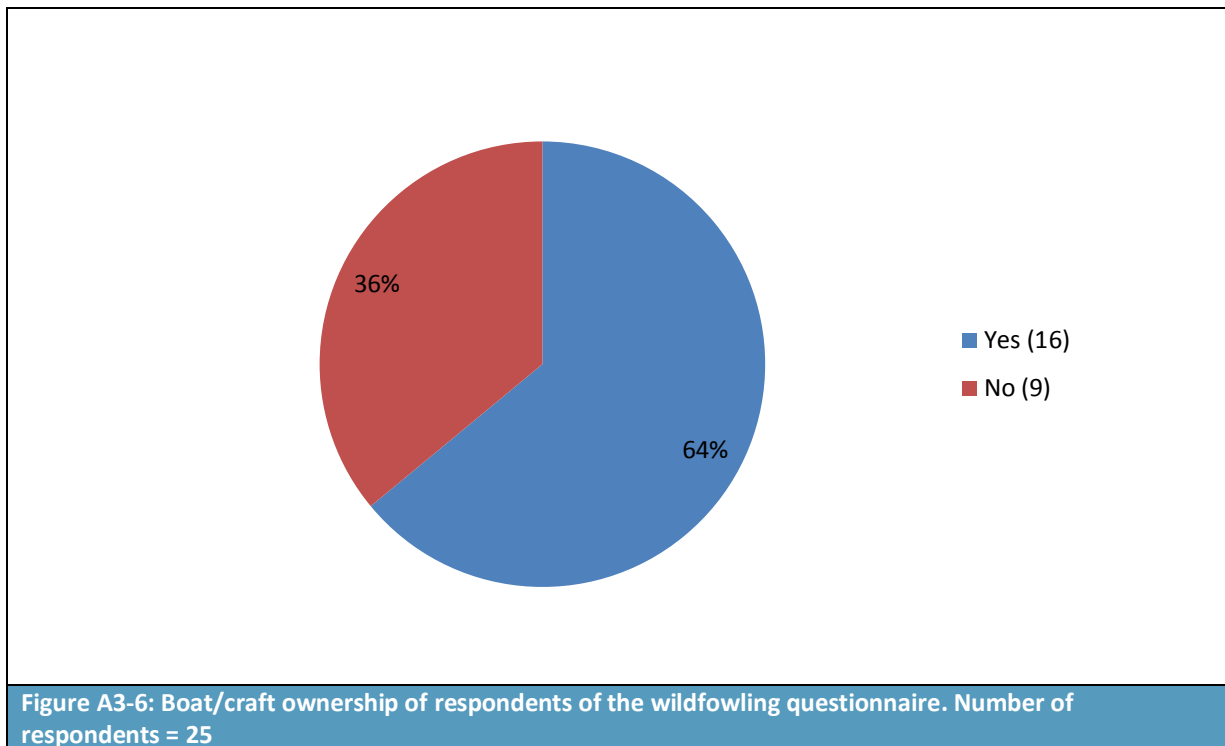
Question 4: When taking part in wildfowling activities WITHIN the Alde-Ore local area, what accommodation are you normally based in?



Question 5: Approximately how many days a year do you spend taking part in wildfowling activities WITHIN the Alde-Ore local area?



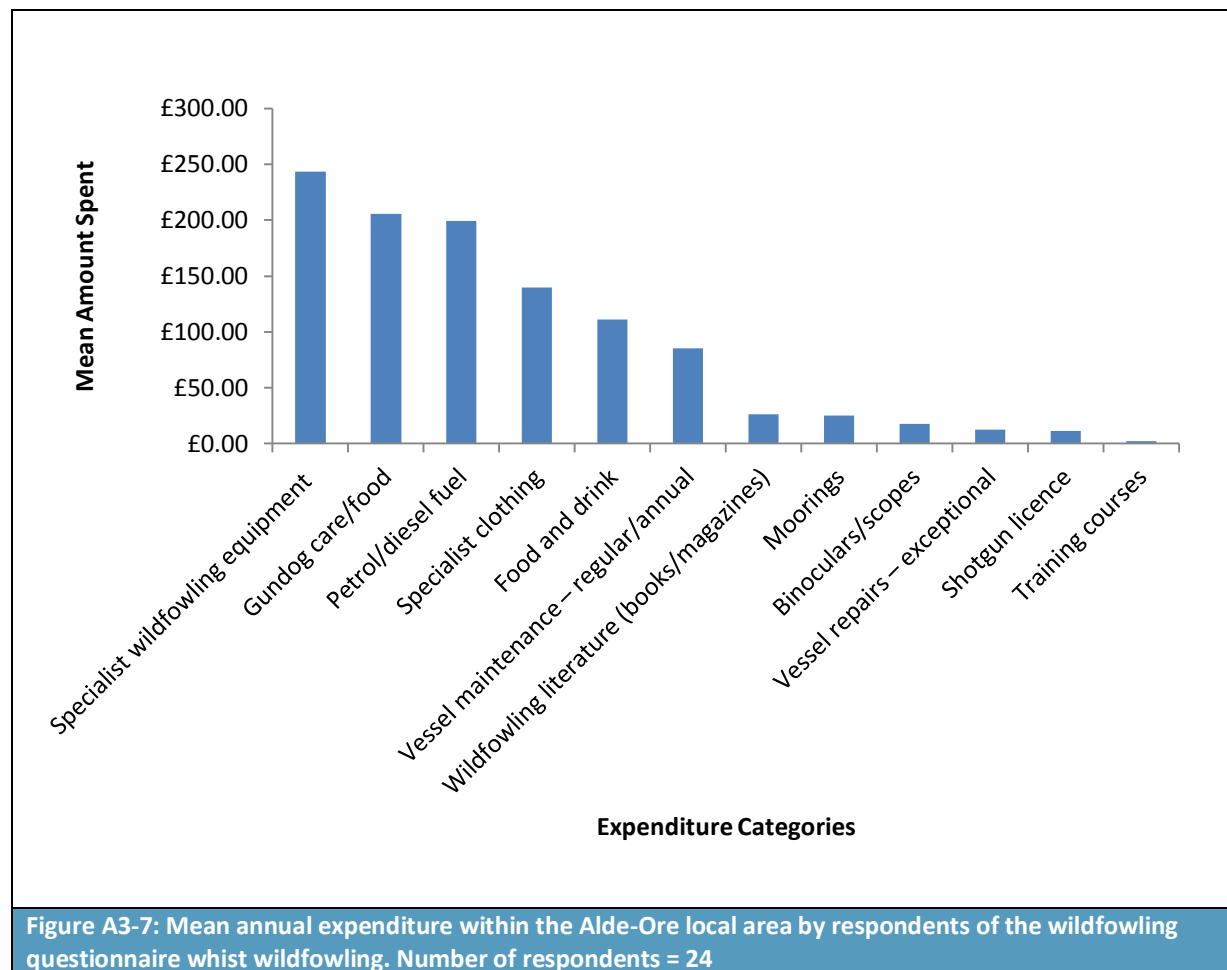
Question 6: Do you or your family/group own a boat/craft for wildfowling?



Specified responses:

- I have the use of a suitable grp dinghy
- wildfowling canoe
- 12 foot dinghy
- Dinghy
- Rib
- 16ft fishing dingy
- 16ft sneak boat
- Small fishing boat
- 17 feet dory
- 12ft fibreglass dory
- 18' Rib and a Wayfarer sailing dinghy150
- Sneak boat
- Dingy
- Aluminium dinghy
- Wildfowling punt

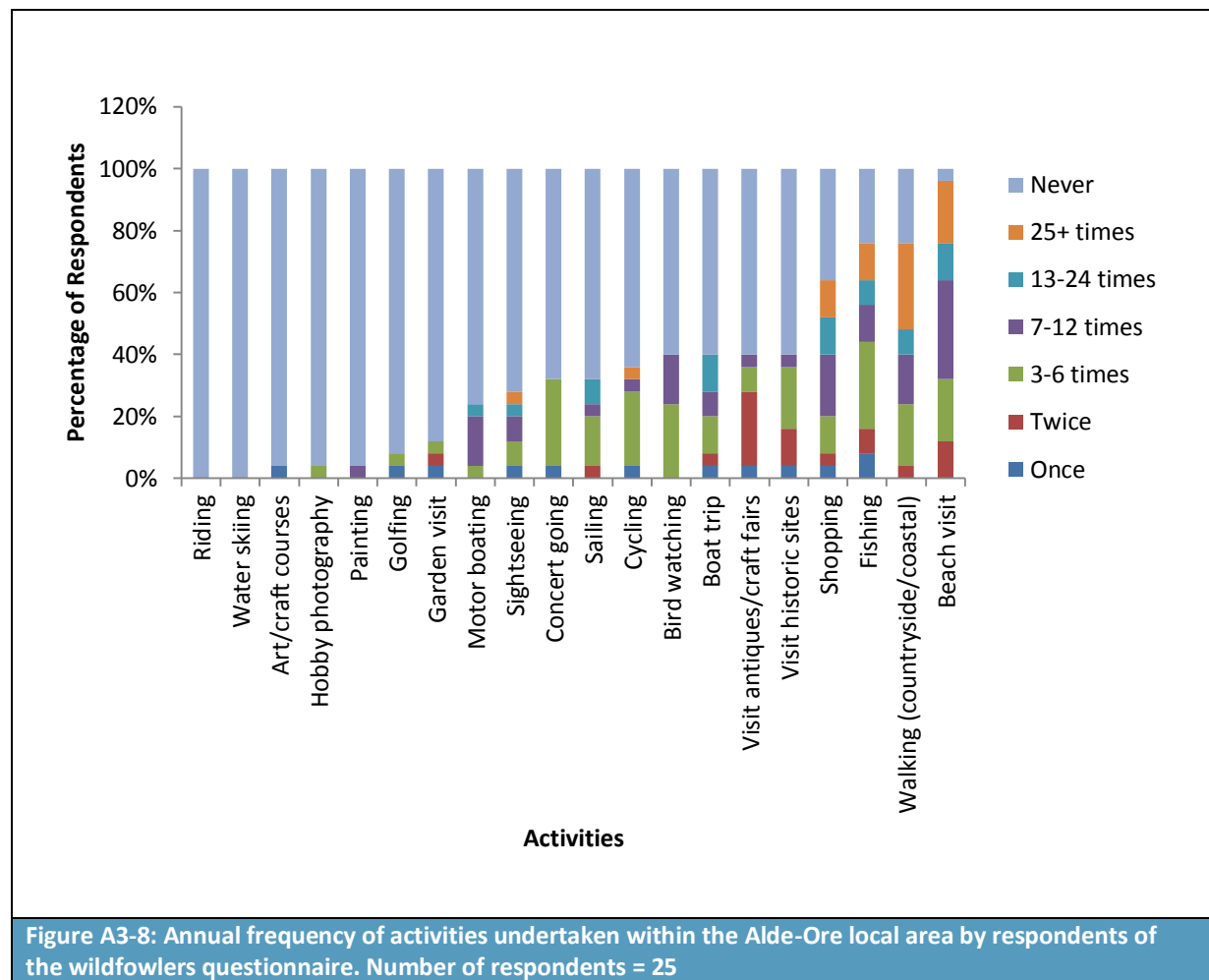
Question 7: Can you indicate how much you are likely to spend over an average YEAR WITHIN the Alde-Ore local area on the following whilst participating in wildfowling activities? (To the nearest £)



Other:

- nil
- £50 conservation/maintenance
- 240 club subscription and guest permits
- also a member of other associations

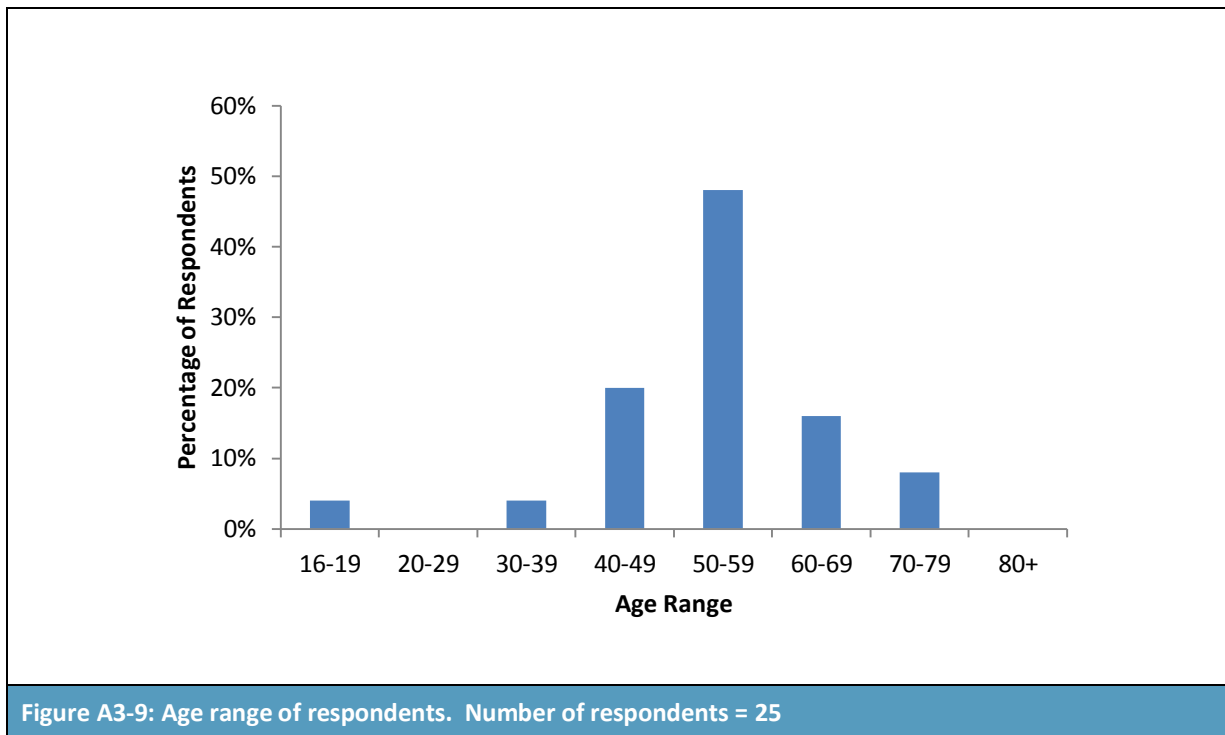
Question 8: How often do you undertake the following activities IN the Alde-Ore local area in an average year?



Other:

- £50 conservation/maintenance
- 240 club subscription and guest permits
- also a member of other associations

Question 9: Please indicate your age

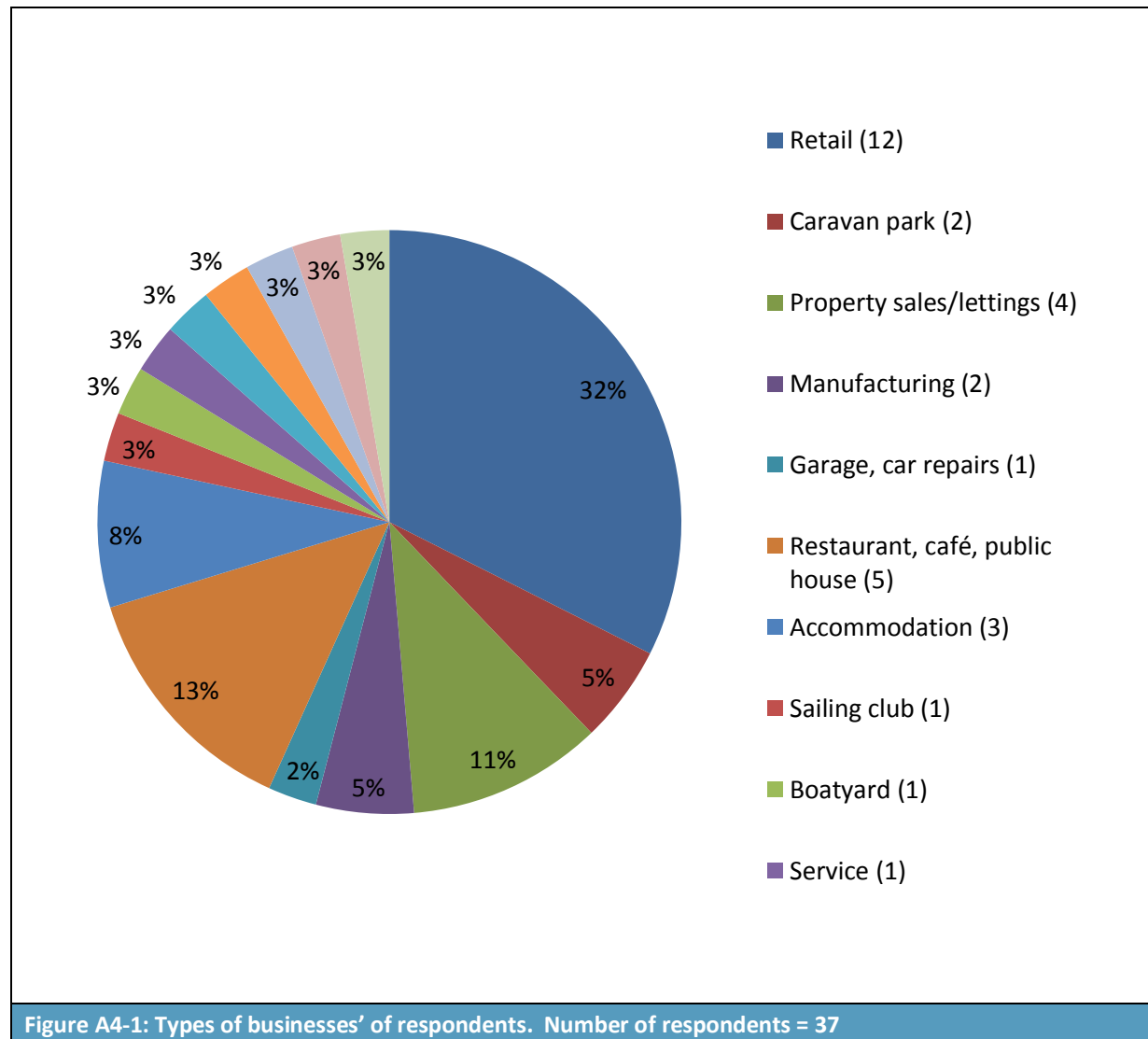


Annex 5 Businesses Questionnaire Analysis

Question 1: Business name

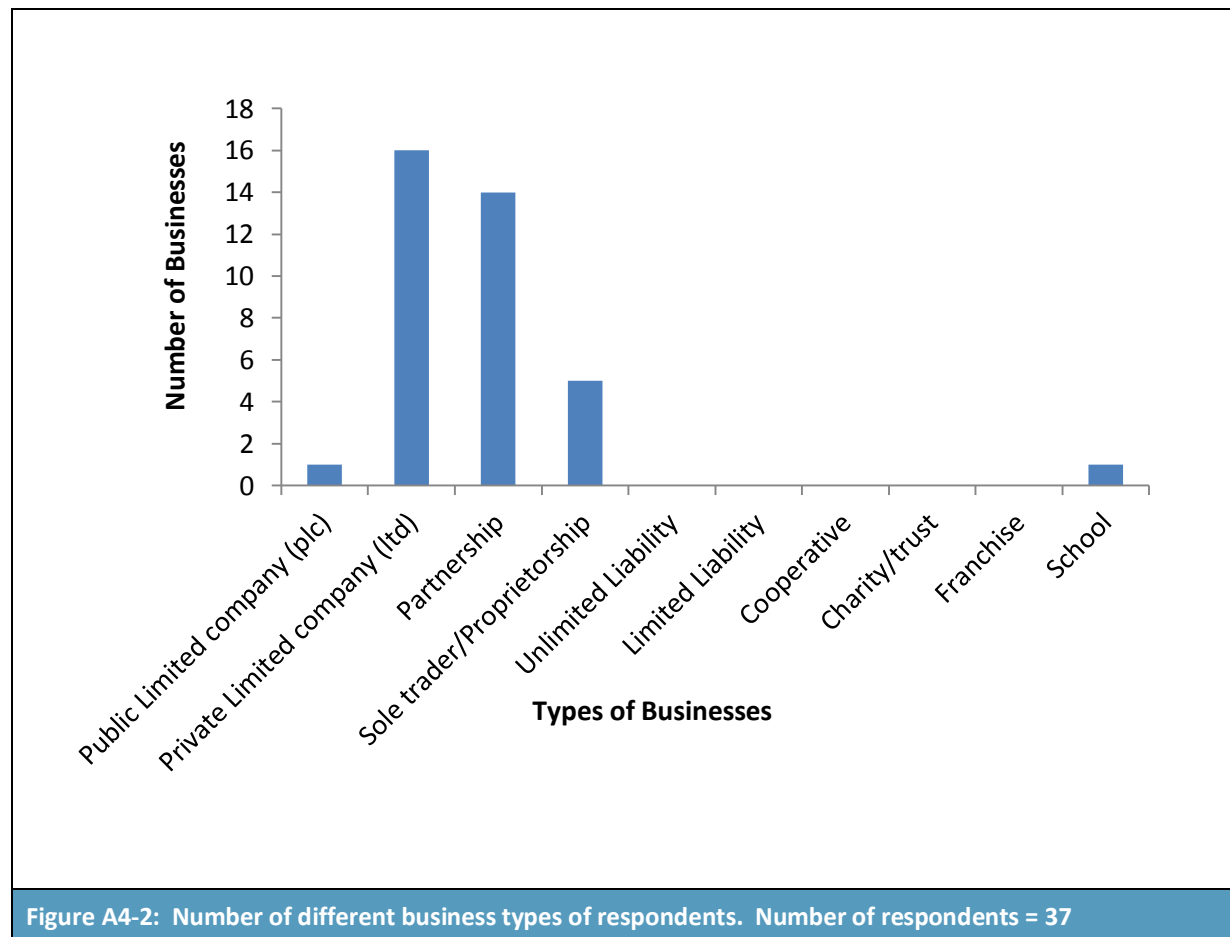
Confidential

Question 2: Type of business

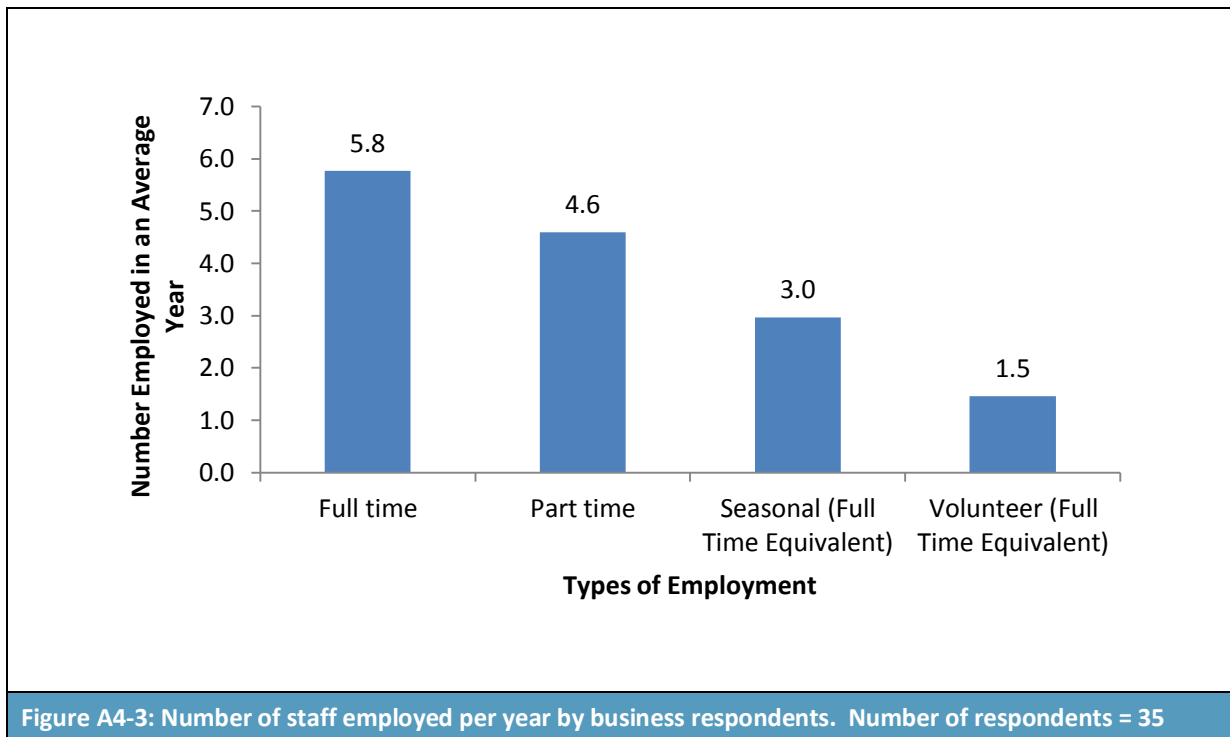


Question 3: What type of business are you?

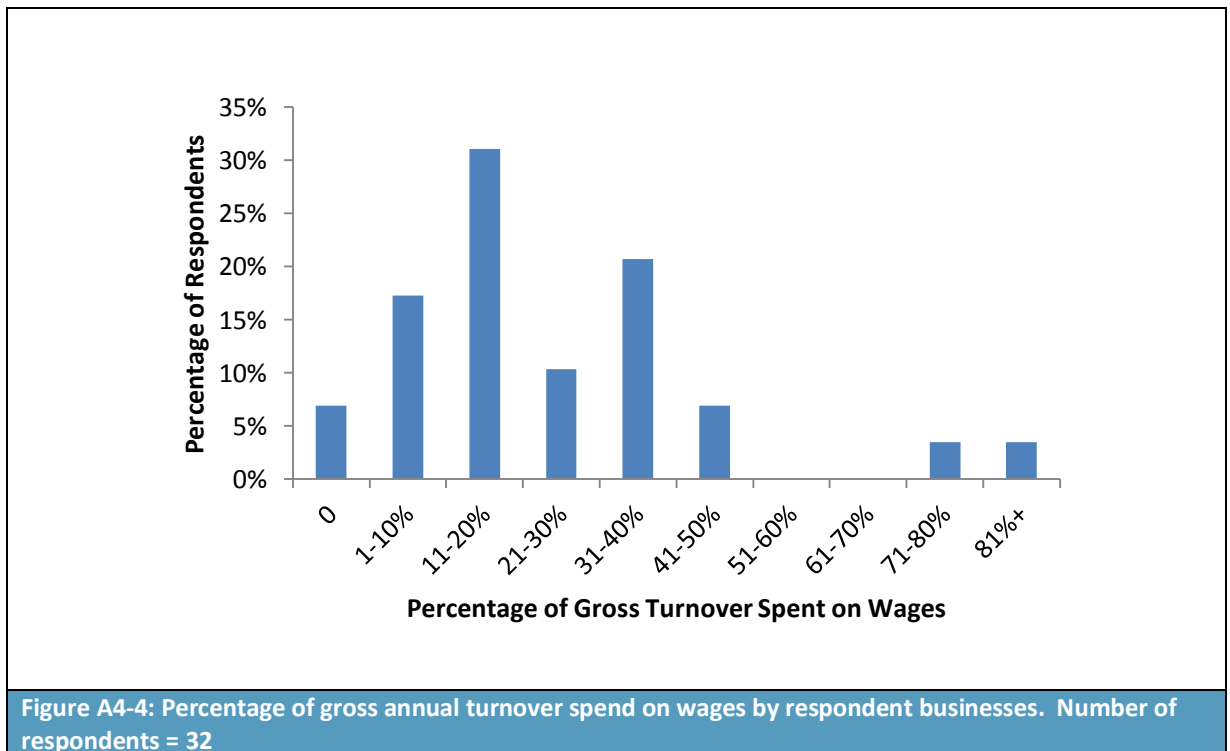
Table A4-1: Type of business		
Type of Business	Number of respondents (ranked)	Percentage of businesses
Private Limited company (ltd)	16	43%
Partnership	14	38%
Sole trader/Proprietorship	5	14%
Public limited company (plc)	1	3%
Other*	1	3%
Number of responses	37	



Question 4: Please indicate how many staff you employ in an average year



Question 5: What (roughly) is your total cost of wages as a percentage of your gross annual turnover?



Question 6: Please can you indicate your gross annual turnover?

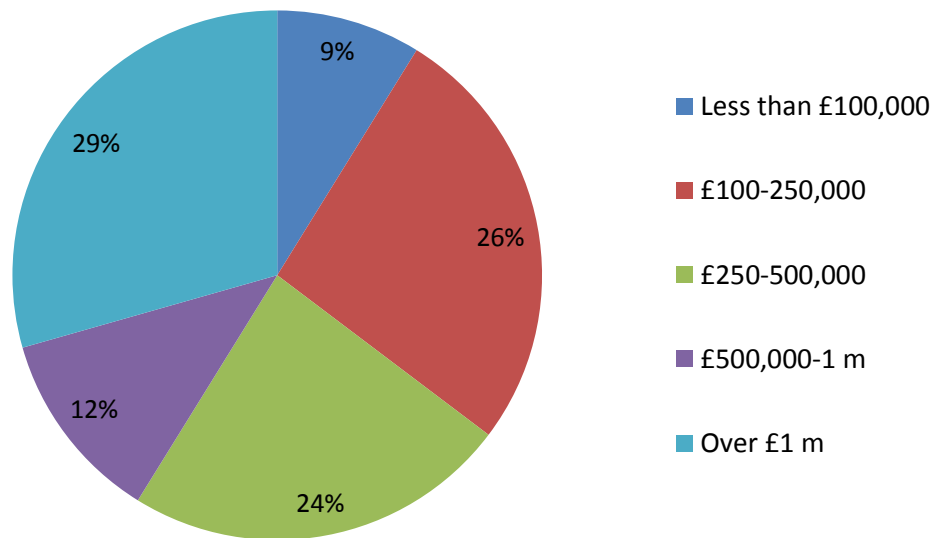
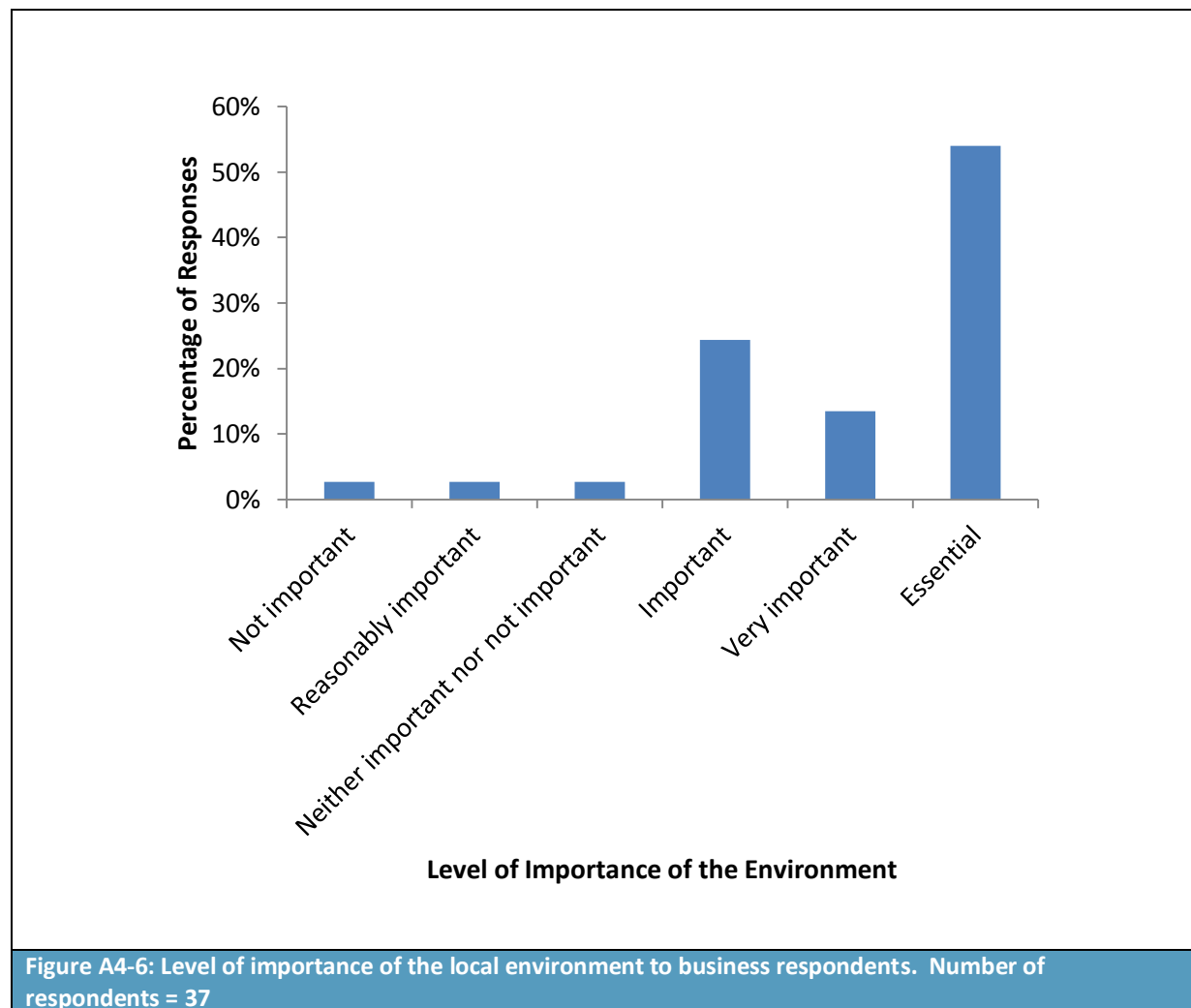
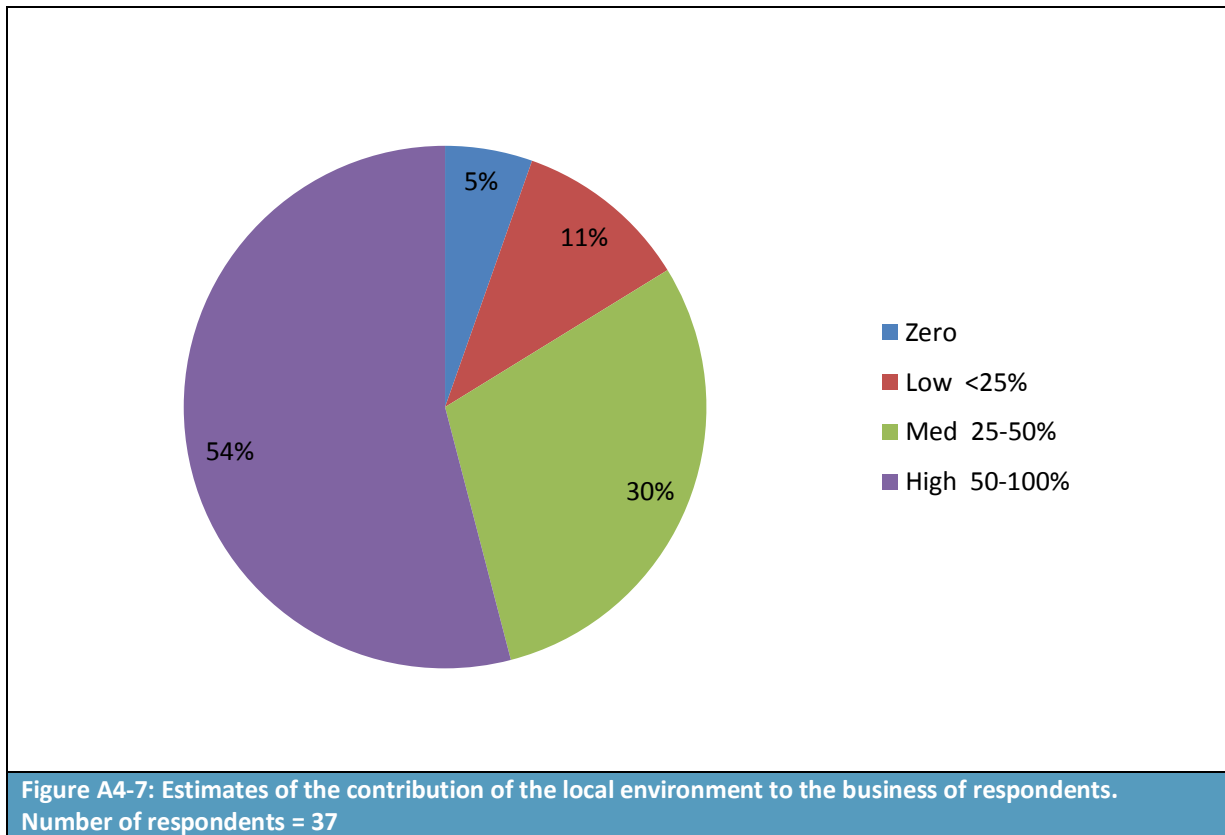


Figure A4-5: Estimated gross annual turnover of business respondents. Number of respondents = 34

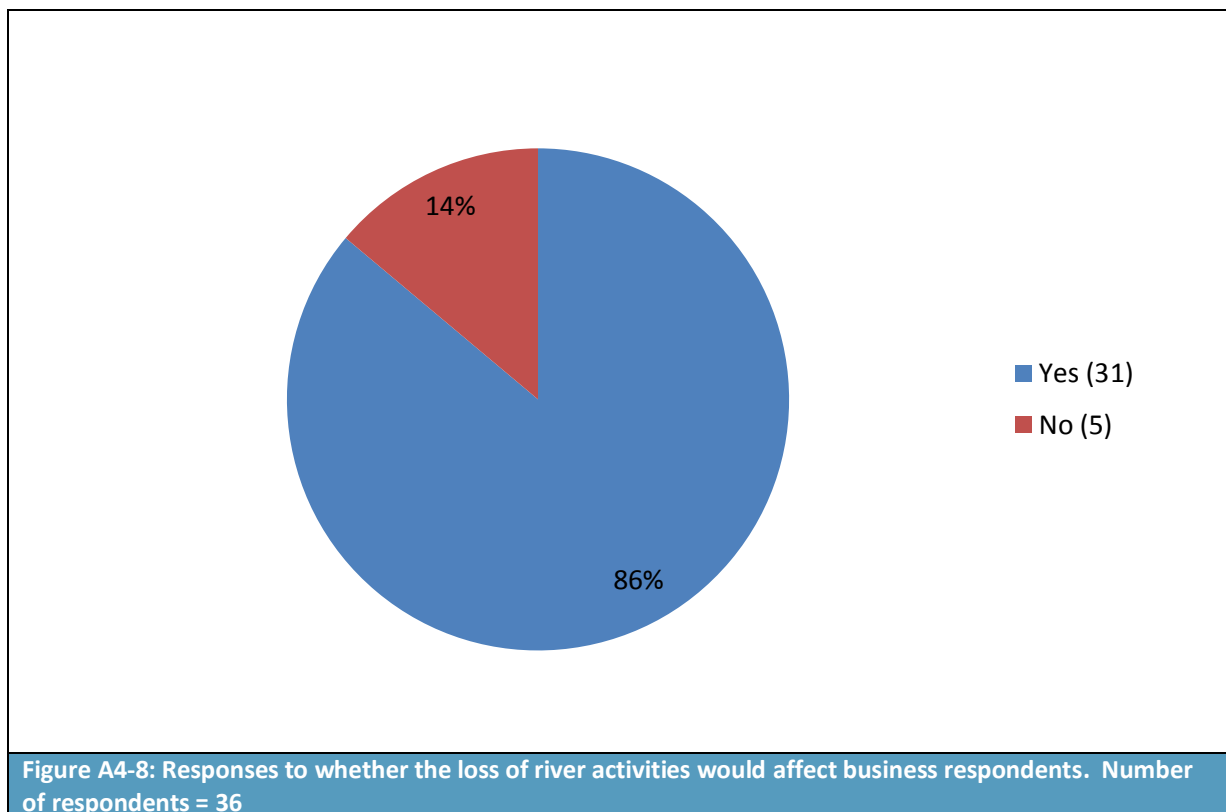
Question 7: How important do you consider the quality of the local environment to be to your business?



Question 8: Can you estimate how much the local environment contributes to your business?



Question 9: If river activities were no longer possible and visitor numbers declined, would this affect your business?



Additional comments:

- The club would probably cease
- Yes possibly
- The essential thing for our business is the availability of fresh water for irrigation, accounting for over half of our turnover.
- Business future not clear if walls go below Martello tower; business will go if walls go at Brick Dock (i.e. dependent on conformation of estuary)
- Business would definitely not be viable
- Small decrease as the seaside is a more important feature than the river; many tourists are unaware of the river.
- August is our second best month of the year because of river activities. It used to be the best month
- It brings a great deal to the area
- Reduced tourism would reduce our sales
- It would close down our business which has been operational 29 years and our family business for the last 21 years. It is our sole source of income.
- Local infrastructure would deteriorate badly and property values would be decimated

Question 10: What proportion of your gross annual turnover occurs during the following months?

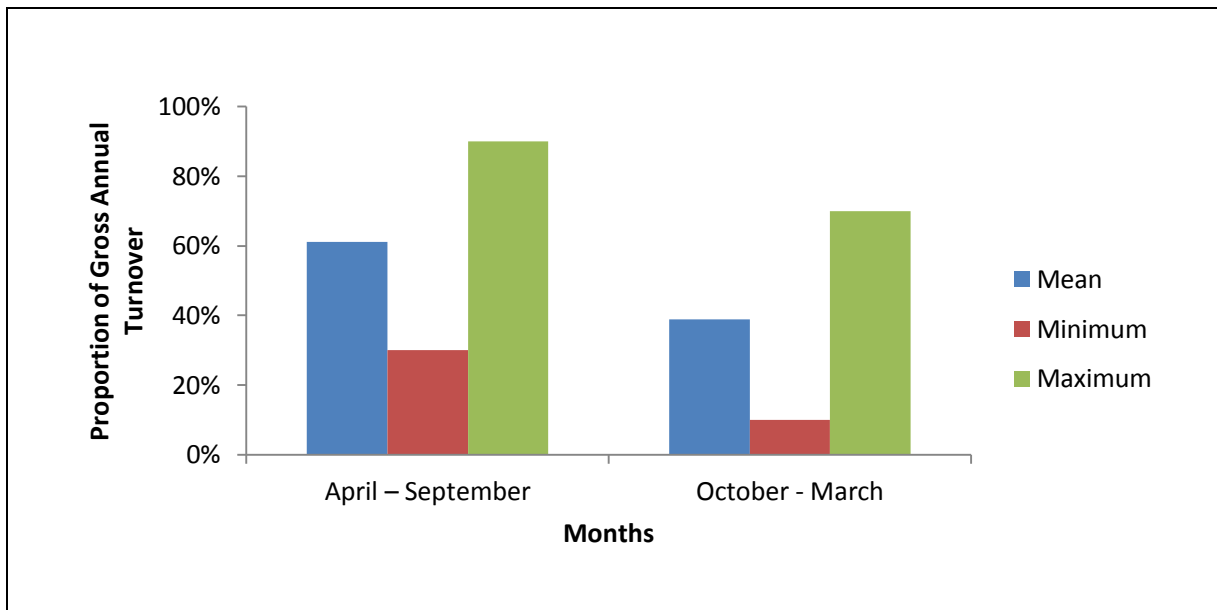


Figure A4-9: Mean proportion of gross annual turnover received in the months above for business respondents. Number of respondents = 31

Question 11: Which activities do you consider contribute to your business?

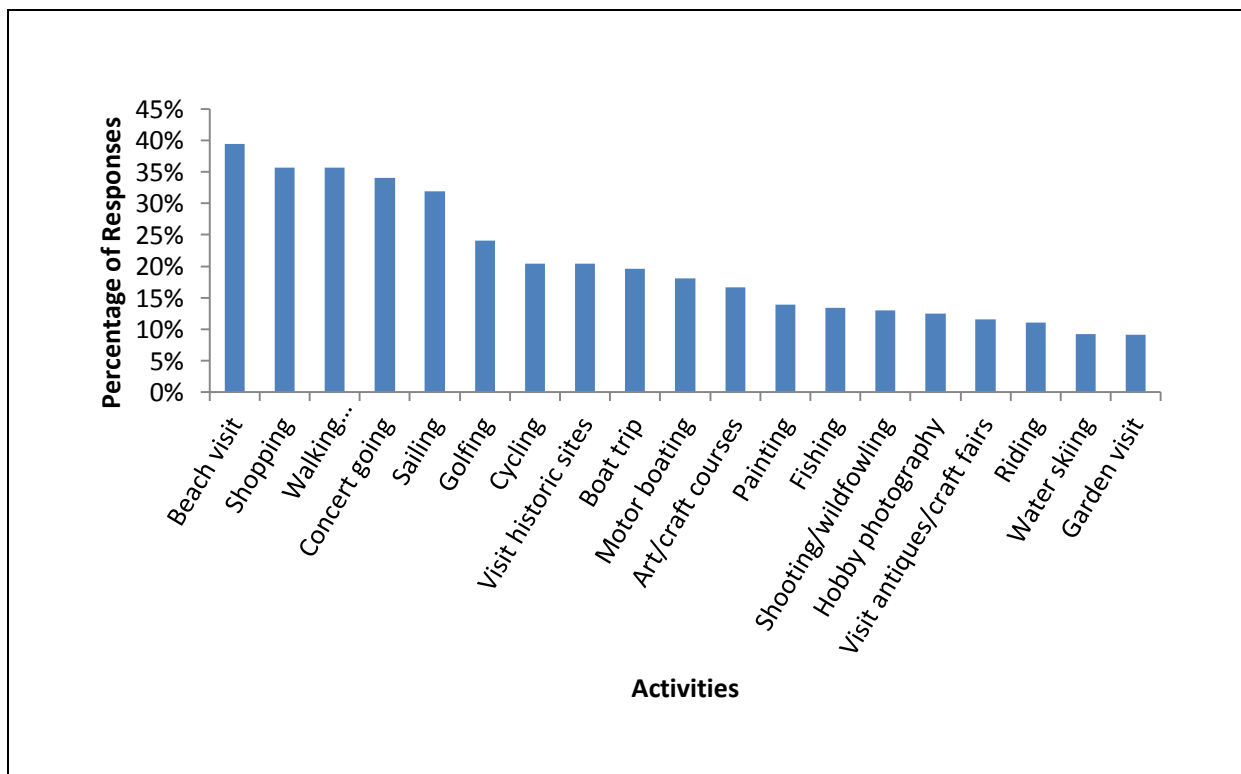


Figure A4-10: Responses regarding the contribution of activities to business respondents. Number of respondents = 34



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